MARKETING & ECONOMICS SERVICES

Annual Report 1987

Nova Scotia Department of Agriculture & Marketing

1987 Annual Report

1987 was a year of transition for the Marketing and Economics Branch. The Director's position was filled in March (G. Brian Smith), the Co-operative Administration position (Fred Pierce and Effie Graham) was moved to the Department of Development in April, and the Promotion Marketing Specialist position was vacated in October. The remaining staff are credited with carrying on the activities of the Branch:

Economist	Marketing Specialists	Secretarial	Audio-Visual
Dave Robinson	Ray Foote	Dawn MacKay	Cheryl Baird
	Linda MacDonald	Elinor Maher	Sheila Ferguson
	Peter Rideout	Sharon McLean	Micheline Gibson
	Dave Smith		

The following is a compilation of reports from the above listed individuals. In addition, there is a summary of the activities of the Natural Products Marketing Council as prepared by the Chairman, Mr. Stuart Allaby.

G. Brian Smith
Director

/m

ANNUAL REPORT 1987

David E. Robinson, P. Ag., Economist

Marketing & Economics Services

Nova Scotia Department of Agriculture & Marketing

Halifax, Nova Scotia

ECONOMICS PROGRAM 1987

1. General Responsibilities and Duties

ECONOMIC PROGRAM HIGHLIGHTS

2. Workshop on Agricultural Development
3. NAS Review of the Feed Freight Assistance Program
4. Feed Grain Policy
5. Trade Negotiations and the Canada/U.S. Agreement
6. Agricultural Stabilization
   (a) Apples
   (b) Grain
   (c) Hogs
   (d) Cattle
7. Census of Agriculture
8. Greenhouse Vegetable Market Review
9. AFDA and ALFI Evaluations
10. Exhibition Impact Study

ECONOMICS PROGRAM 1987

1. General Responsibilities and Duties

In 1987 responsibility was maintained for providing economic analysis and associated services to the Department and industry with respect to policy issues and economic developments. This included the review and assessment of external studies and reports having significance for the agricultural industry and Nova Scotia. A current perspective was maintained of the economic outlook for agriculture particularily for the medium term. In some cases, where there were more immediate implications for departmental programs and policies, shorter term forecasts were monitored.

Reports were made on a wide range of matters. Intensive involvement continued in the areas of feed grain policy, the related economic problems of the hog sector, and the related difficulties in securing a viable arrangement for the provincial hog sector within the national stabilization program. Progress was made in the development of stabilization programs for other commodities during the year. As indicated below, trade issues were the major on-going area of involvement for economic services throughout the year.

A liason was maintained with statistical agencies regarding information needs and industry situations in Nova Scotia. This included serving on the Federal/Provincial Committee on Agricultural Statistics. Statistical users were regularily assisted with regard to the sources, availability, quality and utilization of statistical information.

2. Workshop on Agricultural Development

As a component to the extensive Provincial/Federal/Industry strategic planning exercise undertaken in the fall of 1986, a workshop on agricultural development was held in Truro on February 5th. The theme for the day was "Agri-Food Development-Our Growing Strategy". This provided an opportunity for the large number of people who had worked at the sub-committee level to meet together and discuss the overall industry perspective. This workshop was organized in cooperation with the other two members of the Planning Secretariat, A. Forbes (Agriculture Canada) and L. Settle (Nova Scotia Federation of Agriculture).

There were ninty-seven participants who attended the workshop and the closing guest speakers/commentators were Mr. W. V. Grant and Prof. I. McAllister of Dalhousie University. This event was a unique undertaking and was considered, by most participants, as a valuable experience.

A proceedings report on the workshop was subsequently prepared and is available on request. (Agri-Food Development - Our Growing Strategy - Proceedings, February 5, 1987, 63 p.)

3. NAS Review of the FFA Program

The Feed Freight Assistance Program, administered by the Livestock Feed Board of Canada, was reviewed in 1987 as part of the National Agriculture Strategy. Mr. Walter V. Grant conducted the Review. Extensive support was given to this undertaking in the form of analytical services and an on-going technical advisory role. Numerous

meetings were held with a wide range of industry and public officials in Nova Scotia, New Brunswick, Newfoundland, Quebec, Ontario and British Columbia. Many problem areas involving the Program were investigated. Mr. Grant made a series of recommendations for improvements in the operation of the Program and towards developing a more coherent policy. (Copies of the report, A Review of the Feed Freight Assistance Program. W. V. Grant, June 1987, 71 p. are available on request.)

4. Feed Grain Policy

Separate from technical support given to the NAS Review of Feed Freight Assistance, assistance was given to the Department and later the industry in considering and reacting to the suggested changes in the report. Other feed policy and related matters investigated during the year included the countervail duty on U.S. corn, a proposal for the establishment of a summer export program at the Halifax Grain Elevator, and the historic feed grain equalization policy vis-a-vis eastern Feed Freight Assistance Zones and those in British Columbia.

Assistance was given to the Pork Producers Association of Nova Scotia in preparing a major submission to the Livestock Feed Board of Canada. This dealt with serious problems, which have resulted in the hog industry as a result of recent implicit changes in the historic equalization policy and the inconsistencies between the Livestock Feed Assistance Act and their program at present.

ECONOMIC PROGRAM HIGHLIGHTS

5. Trade Negotiations and the Canada/U.S. Agreement

The Canada/U.S. bilateral trade negotiations and subsequent agreement, and the new round of multilateral trade negotiations were the major area for analysis and consultations in 1987. Assistance was given to the provincial trade negotiations staff with respect to information and research on agricultural markets and issues throughout the negotiations and since. Three lengthly briefings on agriculture given at meetings of the Federal/Provincial Continuing Committee on Trade Negotiations were attended. These provided an opportunity for intensive provincial input. Analysis was undertaken in such areas as the Two Price Wheat Policy, the seasonal tariffs for fresh fruit and vegetables, and the economics of importing U.S. barley.

A number of meetings with industry representatives were held during the negotiations and after the agreement was reached. A series of public meetings on the Agreement was attended. A presentation on the impact of free trade was given at the annual meeting of the Nova Scotia Fruit Growers Association. (This is available on request. The Canada/U.S. Trade Agreement and the Apple Industry in Nova Scotia, 13 p.)

Briefings and discussions on Canada's position and stragegy at the current Multilateral Trade Negotiations were held at meetings of the Federal/Provincial Committee on Agricultural Trade Policy.

During the year the Agriculture Committee of Voluntary Planning distributed our initial report (1986) on the impact of freer trade on agriculture in Nova Scotia to all farm organizations in the province in an attempt to assess its accuracy. Only two minor, but valid, criticisms were made. Both of this concerned single statements in the report and

the organizations and issues involved were on either side of the trade debate. This was seen as an indication of the quality of the information put together on the position of agriculture in Nova Scotia with respect to liberalized trade and of its factual nature and balance.

6. (a) Stabilization - Apples

Agreement was finally reached in 1987 on a National Tripartite Stabilization Program for apples. (Program development work was started in 1985.) This is the first Tripartite Stabilization Program in Canada to cover production in all provinces and the level of participation in the provincial industry has been very high. Service is now being given on a steering committee for an impact study of Federal/Provincial programs that affect apple production in the various production regions. This is the first step towards a harmonization of apple programs across Canada. A difficult consensus on this process was reached during the year.

(b) Stabilization - Grain

Special features of provincial (and regional) grain production were studied during the year as they affect the most appropriate approach for a regional stabilization program. An inadequacy was found in legislated (A.S.A.) tripartite funding arrangements in the Maritime circumstance. The possibility of seeking a funding arrangement more consistent with the Western Grain Stabilization Act was identified. This was subsequently reported and discussed with the Steering Committee of the Maritime

Grain Stabilization Study. Another consideration studied was the cost-effectiveness of a grain stabilization plan limited to only cash grain production in Nova Scotia. Full coverage was recommended. The final consultant's report fully incorporated and recommended the suggested modifications which had been developed. Negotiations for a regional plan are now pending.

(c) Stabilization - Hogs

As a member of the Nova Scotia Pork Price Stabilization Board quarterly support prices were established, adjustments were made in producer eligibilities and other operational matters were addressed with respect to this program. Market and expenditure forecasts were prepared on a regular basis during the year. Meetings of a special stabilization committee of the Pork Producers Association of Nova Scotia were attended and information was exchanged towards the goal of developing a longer-term stabilization program. A meeting was also arranged between this group and others with Dr. Vern Smith, a consultant for the Agricultural Stabilziation Board, to discuss the conditions for late entry into the National Tripartite Stabilization Program for hogs.

Later in the year, the feed cost problems of this industry were discussed at a meeting of the directors of the Pork Producers Association of Nova Scotia. The comparatively high cost of feed in Nova Scotia is the central difficulty in achieving an acceptable accomodation for Nova Scotia hog producers within the National Tripartite Stabilization Program. The cost position of hog production in the Province was investigated and evaluated relative to those regions of North America where general price levels are largely determined.

(d) Stabilization - Cattle

Discussions were held with the Nova Scotia Cattlemens' Association concerning the need for a provincial deficiency payment for finish cattle marketed during 1985-86. Information on prices and volumes were reported. A subsequent payment was made by the Province.

7. Census of Agriculture

The 1986 Census of Agricuture became available in 1987. The Census reported a drop in the number of Census farms and in the area of land being used for agricultural purposes in Nova Scotia. Initial analysis was undertaken on these and other developments and reports made as the Census information became available. Further in-depth analysis of the large Census of Agriculture database is being conducted.

8. Greenhouse Vegetable Markets

As a follow-up to an extensive project in 1986 which involved analysis of greenhouse vegetable markets, an up-dated review was completed and reported at the annual meeting of the Greenhouse Growers Association of Nova Scoita. A special feature of this report involved an assessment of the local price and market impact of a very large greenhouse complex under construction in St. John's Newfoundland. (The report, Greenhouse Vegetable Markets and Production in Atlantic Canada, 24 p. is available on request.)

ECONOMIC PROGRAM HIGHLIGHTS

9. AFDA and ALFI Evaluations

As a member of the AFDA Evaluation Committee, the final reports of consultants on the Technology Development Program, the Market Development Program, the Technology Acceleration Program, the Information Sub-Program, the Agricultural Resource Development Program, and the Human Resource Development Sub-Program were reviewed, discussed and studied. An ALFI Evaluation Committee was established during the year and worked on a plan and approach towards evaluating the ALFI Program including a mid-term review to be undertaken in the December 1988 to February 1989 period. Work was undertaken, attempting to make ALFI objectives quantifiable for evaluation purposes.

10. Exhibition Impact Study

The Exhibition Association of Nova Scotia requested assistance in May for a study on the impact and economic benefits of agricultural exhibitions. A young analyst, Murray Trott was secured and managed for the Association within their minimal budget for this undertaking. The final report, The Impact of Agricultural Exhibitions on the Economy of Nova Scotia by Murray Trott, November 1987, 34 p. is available on request.

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ANNUAL REPORT 1987

Raymond P. Foote, P.Ag.
Marketing Specialist (Livestock)

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

PROGRAM REVIEW: JANUARY 1 TO DECEMBER 31, 1987

The projects and programs recorded are highlights of the 6th year, in terms of general programming and work responsibility for food marketing, with primary focus on red meats, poultry, dairy products and livestock marketing by this office.

In addition, this office continues to act as budget manager for the Hog Transportation Policy and the Pork Price Stabilization Program. Membership on and Secretariat Services continued for the EDP Committee and the audit subcommittee of the Department Exhibition Committee. This office also served as a member of the Market Development Advisory Committee of the Agri Food Agreement.

Highlights of requests for information, material and/or advisory assistance sought by Department personnel, industry, trade associations, interdepartmental groups and committees on a provincial and interprovincial basis follow.

CLIENT SERVICES:

Specific market assessments and profiles were undertaken for industry and other agencies during the year. A partial list includes:

- Ad track commodity features -Jan., Mar., June, Sept.
- Countervail duty questionnaire - hogs -January, February
- Meat Industry Task Force -January
- Price & Volume Chart Series -Jan., Mar., June, Sept.
- Provincial Trade Dev. Constraints Study-February
- Consumer Beef Market Survey, Anti. Co. -February
- Chevon Meat Market Evaluation -March, April
- U.S. Senate Inquiry - Beef 332 -April
- Hide Sales -April, June
- Venison production and market overview -May
- Veal export market validation -May, July
- Cattle Volume Seasonality, 1982-86 -May
- 1986 Beef Feature Activity - Sobeys -June
- Co-operative Advertising Study (Turkey)-June - October
- Deli Meat Volume Survey - June

- By-product sales to pharmaceutical sector - August
- Rabbit Ranching Update - August
- Marketing & Economics Branch Long Range System Plan - August
- Branch Strategy & Policy Paper Development- Sept., Oct.

MARKET EDUCATION AND EXTENSION:

N.S.A.C. TECHNOLOGY DAYS - JANUARY — Participated on a panel reviewing beef production and marketing systems available to regional producers. Provided analysis present consumption and purchase patterns.

CANADIAN EMPLOYMENT AND IMIGRATION CENTRE LECTURE- FEBRUARY — With Linda MacDonald, provided a review of food retail and foodservice sectors for women entrepreneurs.

SHEEP PRODUCTION SHORT COURSE - MARCH — Provided presentation on sheep and livestock meat marketing systems in Atlantic Canada.

WESTERN ANNAPOLIS VALLEY BEEF PRODUCERS ASSOC. - OCTOBER — Provided a presentation to the Association's annual meeting on consumer beef preferences and purchase trends. Additional comments were made on price discovery and reporting in the region.

VEAL STUDY - DECEMBER — Participated in a national study on development of veal industry in Canada and it's present status.

MARKET INFORMATION REVIEW- DECEMBER — Provided an assessment of data collection practices, validity and timeliness of Agriculture Canada market reports in the province. This was part of a national review of policy and programs by the Canadian Government.

AUDIO VISUAL AND EXHIBIT MATERIALS - Developed for Branch and client use in 1987, including slides, charts, graphs and tables in co-operation with other Branch members.

INFORMATION RADIO RELEASES - Releases on livestock and meat product topics were scripted and released in co-operation with Audio Visual section.

LIVESTOCK MARKET REPORT - Supervised the Branch-sponsored weekly radio livestock price information program produced by Frank MacDonald, Truro, and released via Nova Scotia Government Services channels. This successful program is carried as a public service by the majority of the Nova Scotia radio stations.

STAFFING DEPARTMENT EXHIBITS - Staffed Branch exhibits including the Food Fair Atlantic,(September) the Atlantic Winter Fair,(October) and assisted with commodity exhibits at the Halifax Atlantic Provinces Restaurant Show.

WORKTRIPS:

3rd Canadian Meat Science Assn. Symposium
Ottawa
February
-Charter member to this association which serves as an information society for members. The second annual meeting featured a symposium on new developments and technologies in restructured meats. Proceedings were published and circulated to Branch members, Department and industry personnel. Have been asked to serve on a national education committee for the industry and association.

67th Canadian Meat Council
Ottawa
February
-Joined industry and government personnel in lively interactive programs focusing on meat nutrition and safety, market access for fresh domestic meat and international trade in live and meat sales. Papers and summaries were circulated to Branch, Dept. and industry personnel.

CANADIAN LIVESTOCK MARKET INFORMATION ADVISORY COMMITTEE
OTTAWA
FEBRUARY

- The meeting received regional reports from members on local initiatives and concerns. Agriculture Canada presented an update on efforts to introduce an electronic markets information service. Statistics Canada provided information on per capital meat consumption reporting and preliminary 1986 census data. Summary circulated.

HOSTEX
TORONTO
APRIL

- Co-ordinated itinerary and arranged contacts at the Hostex Foodservice Show for a group of provincial producers and processor/distributor personnel. The trip increased awareness of food products directed to the foodservice sector and jointly identified products Nova Scotia processors/distributors could introduce regionally. The group included representatives of the Nova Scotia Pork, Beef and Lamb Associations. Processor and distributor representatives included personnel from A.C.A., Antigonish Abattoir, O.H. Armstrong Meats and MacKenzie Sales.

PORK FOODSERVICE LAUNCH
CHARLOTTETOWN
MAY

- The Canadian Pork Council and the regional Pork Marketing Boards launched a major foodservice initiative at this reception and banquet for the trade and industry. The Branch has been pleased with the results and industry's leadership.

ATLANTIC MARKETING CONFERENCE
TRURO
June

- Participated, with other Branch and regional marketing staff, in a skills updating seminar. Focus was on new product development and introductions.

BEEF INDUSTRY SEMINAR
TORONTO
October

- A second successful Beef Industry Seminar was held under the auspicious of the CCA and BIC. This followed a session in 1983. Speakers covered topics ranging from branded beef, service meat counters, packaging innovations and changing processing technology. A product reception introduced a wide variety of new beef items. Copies of presentations were circulated.

ROYAL WINTER FAIR
TORONTO
November

- In co-operation with Branch members, developed industry exhibit and literature for introduction of the Dairy Cattle Sales Society of Nova Scotia to a national audience at the Royal Agricultural Winter Fair. The display accompanied a Nova Scotia herd exhibit, both were well received.

The Marketing and Economics Branch assisted the Nova Scotia Holstein Branch and the Joint Dairy Breeds Assn. of Nova Scotia create the charter for the Dairy Cattle Sales Society of Nova Scotia. The new society is registered by the Provincial Registrar of Joint Stock Companies and has as its objectives:

1. to promote the dairy cattle breeds of Nova Scotia
2. to maximize returns on breeding stock sales for dairy producers.

Annual exports of Nova Scotia dairy replacement cattle range

from 100 to 400 per year. The Society estimates 3000 head, with a potential value to $3 million, are available on provincial dairy farms.

The $5 one-time membership to the Society may be paid by subscription or from the proceeds of the first Society generated sale.

The Society operates with a six member board--two from each parent breed association and their respective association secretaries. Funding for activities has come from a Marketing and Economics founding grant, Agri Food Agreement and membership fees.

AD TRACK SERIES:

The Marketing and Economics Branch has been monitoring retail food store ads for 16 years. The third annual summary of meat department ads has been completed.

The survey found overall grocery advertising increased in frequency from quarter to quarter during 1987, while the space devoted to meat department advertising has declined and one chain (Superstore) often features ads with no meat items.

% GROCERY ADS WITH MEAT ITEMS

1st Quarter 78%
2nd Quarter 62%
3rd Quarter 60%
4th Quarter 46%

On a commodity basis, processed meats dominated meat department ads in 1987. Fresh beef features declined to First Quarter levels, while chicken lost to turkey.

COMMODITY AD FREQUENCY - 1987

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
PROCESSED MEATS	453	440	459	478
BEEF	156	248	336	157
FRESH PORK	133	113	125	120
CURED PORK	146	133	119	155
CHICKEN	101	118	115	88
TURKEY	73	53	59	104
OFFAL	45	36	44	33
FISH	44	38	27	28
LAMB	15	11	11	10
VEAL	0	2	1	Ø
DUCK	0	0	0	4
GEESE	0	2	0	3

Please note: On four occasions during December Sobeys ads mentions the availability of partridge, quail, pheasant and guinea hens. These are not included in the above totals.

STORE & LOCATION	TOTAL # OF AD ITEMS				NUMBER OF MEAT ITEMS			
	1st	2nd	3rd	4th	1st	2nd	3rd	4th
SOBEYS, HALIFAX	23	68	269	269	4	8	14	34
SOBEYS, TRURO	1471	1404	1451	1495	234	185	184	155
CAPITOL, HALIFAX	1658	1831	1339	1086	290	313	379	316
CAVANAGHS, TRURO	431	437	408	423	154	158	139	137
IGA, HALIFAX	1529	1435	1700	1818	230	235	277	264
IGA, TRURO	1652	1837	1777	1831	254	293	295	265
SUPERSTORE, SACKVILLE*	N/A	92	217	264	N/A	2	8	9
TOTALS	6764	7136	7161	7186	1166	1194	1296	1180

STORE & LOCATION	TOTAL # ADS				# OF ADS WITH MEAT DEPT.				TOTAL LINEAGE			
	1st	2nd	3rd	4th	1st	2nd	3rd	4th	1st	2nd	3rd	4th
SOBEYS, HALIFAX	8	13	37	25	3	7	13	14	5,850	58,200	67,641	95,400
SOBEYS, TRURO	13	14	13	13	13	13	13	12	129,970	148,035	147,600	140,400
CAPITOL, HALIFAX	12	19	17	19	12	16	17	19	23,400	40,176	30,188	26,771
CAVANAGHS, TRURO	13	13	13	13	13	13	13	13	23,400	23,400	23,400	23,400
IGA, HALIFAX	12	24	16	19	11	14	16	13	83,197	100,121	115,797	117,180
IGA, TRURO	24	26	26	26	12	18	15	12	96,812	102,637	120,540	118,933
SUPERSTORE, SACKVILLE*	N/A	25	35	70	N/A	2	7	3	N/A	38,872	54,208	75,168
TOTALS	82	134	157	185	64	83	94	86	362,629	511,441	559,374	597,252

DATA BASES/MARKET GRAPH SERIES:

During 1987 data bases have been completed for the following information, and allowed for quarterly and annual reports tracking market information focusing on prices and volumes for hogs, sheep and cattle:

1. Weekly Rail Grade A1/2 Steer Bids, Calgary, Toronto & Truro
2. Hog Stabilization Activity, Nova Scotia
3. A1/2 Slaughter Steer Prices, Calgary, Toronto & Truro
4. A1/2 Slaughter Heifer Prices, Calgary, Toronto & Truro
5. Average Weekly Live Price 80+ lbs. Lamb, Calgary, Toronto & Truro
6. Average Weekly Lamb Volume, Truro
7. Average Weekly Feeder Steer Prices, 700+,Edmonton, Toronto & Truro
8. " " " " " , 500 , " " "
9. " " " " " , 400 , " " "
10. Weekly Wholesale Beef/Steer Carcass prices A1/2, Montreal, Toronto, Calgary and Atlantic
11. Cash Hog Prices, Index 100, Alberta, Ontario and Omaha
12. Average Weekly Choice Slaughter Steer prices,Oklahoma & Toronto
13. Average Weekly D1/2 Slaughter Cow Prices, Edmonton, Toronto & Truro
14. Average Weekly D3 Slaughter Cow Prices, Edmonton, Toronto & Truro
15. Weekly Wholesale Dressed D1 prices, Montreal, Toronto, Calgary & Atlantic
16. Veal Calves Volume Weekly numbers and prices, Truro
17. Atlantic Volumes Inspected Slaughter, N.S. Origin, for cattle, calves, swine and lamb on a weekly basis
18. Annual Egg Surplus Removal by dozen, Canada, N.S.,N.B., P.E.I., Nfld. and Atlantic
19. Weekly Canadian Processed Egg Production, volume of total liquid break, whole egg and sold as liquid

Interest from various sectors for this type of information tracking is increasing, as this graph series is circulated. Maintenance of the data bases and creation of the graphs are placing further demands on a support staff already strapped for time.

SENSORY CONSUMER TESTING IN 1987 -

Sensory consumer testing (Evaluation) provides reliable product information that can be used for product research and developemnt, quality control and to make sound business decisions.

The Marketing and Economics Branch conducted sensory consumer evaluations in 1987 as part of "Client Services". This program was undertaken by Bela Casson, Marketing Assistant to the Market Development Sector. The evaluations took place at the Food Fair Atlantic, Exhibition Park, September.

The Branch ran acceptance tests for eight companies with a range of products. The products tested over the three day period were:

- Country Paté
- Scottish sausage
- For Farm Bridies (a meat turnover)
- Medium roast beef
- 2 samples of egg nog preference test
- 2 samples of fruit yogourt preference test

At the Atlantic Winter Fair, commodity consumer consultants sampled a range of products to the public. This continued the practice of joint industry and Branch programming.

PROCESSOR-DISTRIBUTOR CONTACT -

Semi-annual or quarterly visits have been undertaken to the following red and poultry meat, dairy procesors, and distributors in Nova Scotia and the Atlantic provinces. These visits included contact with general management, sales and/or production personnel:

- ACA Poultry, New Minas
- Canard Poultry, Division Canada Packers, Canard
- Eastern Protein Food, Kentville
- Eastern Meat Purveyors, Lakeside, Halifax County
- Gainers Ltd., Dartmouth and Coxheath
- Antigonish Abattoir, Antigonish
- Hub Meat Packers, Moncton, N.B.

- Chippin Brothers, Fredericton, N.B.
- Canada Packers, Moncton and Halifax
- Larsens Meat Packers, Berwick
- J.M. Schneider Ltd., Halifax
- MacKenzie Sales, Halifax County

In addition, the following provincially inspected plants were visited:

- O.H. Armstrong, Kingston
- Brookside Co-op Abattoir, Bible Hill
- C. D. Connors, Maitland
- M. Oulton, Windsor
- W. Meehan, Upper Rawdon
- Ells Bros., Sheffield Mills
- Mattie Farms, Tracadie
- George MacNeil, Point Auconi
- LaVerte Meats, Grand Etang

Periodic visits and/or contacts were made with selected uninspected slaughter/processing plants, including:

- Moxsom Farms, Shubenacadie
- Ron England, Pt. George
- Allison Mahar, Halls Harbour
- K. P. Bowlby, Greenwood
- Cecil Reid, Gaspereaux
- M & G Meats, St. Croix
- Horyl's Meats, New Waterford
- Langman Meats, Upper North River
- Eastern Sausage, New Waterford
- Les Carter, East Leicester, Cumberland Co.
- J. W. MacDonald, Sydney
- Brian Siddall, Southampton, Cumb. Co.
- S. Donaldson Foods, Coldbrook
- Kurt's Wholesale Meats, Blockhouse
- Arnold d'Eon, Pubnico
- Continental Delicatessen Meats, Windsor
- Chris's Meats, Dartmouth

In the egg sector, visits were made to:

- Cyrus and Manning Ells, Port Williams
- Archibald Farms Ltd., Port Williams

Farm cheese processors visited were:

- Willem van den Hoek, Economy
- Henry Moloney, Mabou (subsequently closed)
- Holmestead cheese, Nicholsville
- Ran-Cher Farms, Aylesford

Visits to dairy processors included:

- Farmers Co-op Dairy, Halifax Co.
- Baxter's Dairy, Dartmouth
- Cook's Dairy, Yarmouth
- Cornwallis Dairy, Kentville
- Peninsula Farms, First Peninsula, Lunenburg Co.
- Forever April, Sheffield Mills

Other food processors etc:

- Scotian Gold, Coldbrook
- Sarsfield Foods, Kentville
- Fireside Kitchens, Halifax
- Kingswood Condiments, New Minas
- Sea Agritech, Halifax
- Canadian Raw & Pickled Hide Company, Inverness
- J. W. MacDonald, Thorburn

PACKER/DISTRIBUTOR CONTACT includes:

- TRA, Middleton
- Clover Produce, Lakeside
- LPR, Pereau, Kings Co.
- Co-op Atlantic, Sydney, Moncton
- Bolands I.G.A., Dartmouth, includes former Willett operations, Lakeside

LIVESTOCK AUCTIONS: - Maritime Cattle Market
- Bridgewater Federation Sale
- Hants Livestock Sales

The Maritime Cattle Market continues to perform a valuable service for the livestock industry. Although 90% of red brand beef is purchased by private treaty, the clearing house function is essential for all classes.

MARITIME CATTLE MARKET VOLUME SUMMARY

CATTLE & CALF VOLUME

NUMBER OF HEAD

(BY TYPE)

		SLAUGHTER						
YEAR	TOTAL OF CATTLE/CALVES	STEERS & HEIFERS	COWS	BULLS	VEAL	BOB CALVES	FEEDERS	DAIRY REPLACEMENTS
1982	21495	1054	3685	284	1737	7745	5477	1513
1983	21260	1199	3471	278	2066	7060	5448	1738
1984	21839	1025	2972	264	1967	7628	5816	2167
1985	24759	1231	3721	231	1982	8510	6688	2396
1986	28790	1106	3510	246	2010	11373	7928	2617
1987	29941	931	3777	203	2122	10640	9024	3244

CATTLE & CALF VOLUME

& BY TYPE

	SLAUGHTER						
YEAR	STEERS & HEIFERS	COWS	BULLS	VEAL	BOB CALVES	FEEDERS	DAIRY REPLACEMENTS
1982	5%	17%	1%	8%	36%	25%	8%
1983	7	16	1	10	33	26	7
1984	5	14	1	9	35	27	9
1985	5	15	1	8	34	27	10
1986	4	12	1	7	40	28	8
1987	3	13	less than 1%	7	36	30	11

RETAIL CHAIN CONTACT: - Sobeys
- Co-op Atlantic
- F. E. Wade Ltd.
- Real Atlantic Superstore
- Save Easy
- Capitol
- I.G.A.
- Cavanaghs
- Foodland
- Lofood

INTERGOVERNMENTAL LIAISON

This office interacts on a request and enquiry basis with a series of other federal and provincial agencies. These include:

- regional offices of DRIE, Halifax, Sydney and Moncton
- district offices of the N.S. Small Business Services
- Health Protection Branch, Health and Welfare Canada
- Dept. of Industry, Trade and Technology
- Dept. of Consumer Affairs, Nova Scotia
- Health and Fitness, Halifax
- Cape Breton Development Corporation
- Prince Edward Island Development Centre, Charlottetown
- Prince Edward Island Department of Agriculture
- New Brunswick Dept. of Agriculture & Rural Development
- New Brunswick Dept. of Commerce & Technology
- Agriculture Canada - Regional Development and International Affairs, Food Production and Inspection Branches, Animal Health and Meat Hygiene Division
- Quebec Dept. of Agriculture, Food and Fisheries
- Ontario Ministry of Agriculture, Policy Planning; Market Development and Information Sections
- Manitoba Agriculture, Policy Planning; Market Development
- Newfoundland Department of Agriculture, Rural and Northern Development
- B.C. Agriculture
- Statistics Canada
- Revenue Canada

- U.S. Government - Senate Trade Investigation Division
  - International Trade Commission
  - Foreign AgriService, U.S.D.A.
- New England Wholesale Meat Dealers Assn.

LIAISON AGENCIES, BOARDS AND COMMISSIONS AND COMMODITY ASSNS.

- Nova Scotia Dairy Commission
- Nova Scotia Egg Marketing Board
- Nova Scotia Chicken Board
- Nova Scotia Turkey Board
- Nova Scotia Cattlemen Association
- Nova Scotia Pork Marketing Board
- Beef Information Center
- Beekeepers Association of Nova Scotia
- Canadian Pork Council
- Canadian Meat Council
- Nova Scotia Federation of Agriculture
- Maritime Association Chefs de Cuisine
- Atlantic Canada Plus
- Atlantic Provinces Transportation Commission
- Sheep Producers Association of Nova Scotia
- Dairy Goat Association of Nova Scotia

NOVA SCOTIA PORK STABILIZATION

This office continued to act as recording and correspondence secretary for the Board in 1987. This involved agenda development and minutes to quarterly meetings, handling requests for policy and financial information on the Plan from outside agencies.

Shipments by provincial clubs were down 2.5% for fiscal 1986/87. Shifts in production are evident.

SHIPPING CLUB RESULTS BY COUNTY

COUNTY	'85/86	'86/87
ANTIGONISH	6,325	4,902
PICTOU	5,866	5,406
COLCHESTER*	18,798	17,638
CUMBERLAND	10,334	8,092
HALIFAX	1,014	795
HANTS	8,160	8,755
KINGS	125,581	128,069
ANNAPOLIS	19,777	13,917
DIGBY**	28,354	31,177
LUNENBURG	5,256	4,912
Totals	229,465	223,663

* Includes Shubenacadie & Sunrise
** Includes Queens Co.

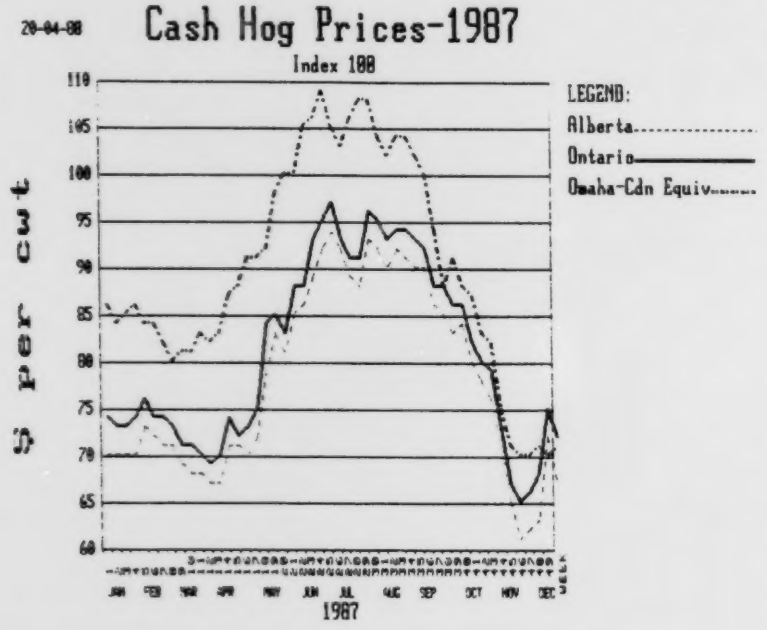
The Stabilization Plan has completed its two year mandate. The Plan now operates from an authorization allowing month-to-month extensions. From June 1987 the market prices permitted a pay down of a portion of the industry loan, estimated to be in the range of $4.5 million in September.

Quarterly coverage for 1987 was:

1st Quarter	$74.00
2nd Quarter	73.25
3rd Quarter	72.75
4th Quarter	73.50

Current eligibility records indicate approximately 200 pork producers are enrolled with the Pork Producers Association of Nova Scotia. One hundred and fifty producers are shipping weekly under the extended Plan.

The accompanying graph, generated from our data base, illustrates weekly cash pork prices on Canadian and U.S. markets.



HOG TRANSPORTATION POLICY - The following interesting excerpt was contained in the May 25 issue of Porkfolio.

"FREIGHT ASSISTANCE RATES TO INCREASE BY ABOUT 33%, because of a reduction in the amount of money being allocated for freight assistance. As a result of a mid-year assessment of the freight expenditures, I feel we can now up our allotments by about 33%."

FREIGHT ASSISTANCE RATES - ADJUSTED AS OF MAY 12, 1987

	LARSENS	HUB	CHIPPIN	ANTIGONISH	ARMSTRONG
ANTIGONISH		1.60	2.50	.15	
SCOTSBURN		1.25	2.15	.35	
SUNRISE		1.20	2.10	1.55	
COLCHESTER		1.10	2.05		
BORDER		.40	1.30		
NORTHUMBERLAND		.55	1.50	1.65	
EAST HALIFAX	.75				
WINDSOR	.45	1.50	2.40		
EAST KINGS	.20	1.75	2.70		
WEST KINGS	.15	2.00	2.90		.25
WESTERN VALLEY	.30	2.25	3.15		.25
CLARE	.80	2.70	3.60		
SOUTH SHORE	.70	1.90	2.85		

The M & E monies are received by the Hob Bd. at the mid-point of the Board's fiscal year, which runs Sept. 1 - Aug. 31.

ANNUAL REPORT 1987

Linda D. MacDonald, P.Dt.
Marketing Specialist (Foodservice)

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

I INTRODUCTION

The report to follow outlines the major initiatives and program activities undertaken by this office during the third year of programming in the area of foodservice marketing.

The primary objective of programming is to increase the awareness and consumption of Nova Scotia food products within the foodservice sector. Closely aligned with this objective is the dispensing of foodservice market information to Nova Scotia producers, processors and other individuals and groups interested in the Nova Scotia foodservice sector.

For the six month period from May to November, the Marketing Specialist, Foodservice, was on leave of absence. The work of her replacement, Phyllis Cipolla, is gratefully acknowledged throughout the body of this report.

II Report of Program Activities

A. LIAISON

1. Contacts

As in 1986, a priority during 1987 was initiating and maintaining contact with individuals and groups in the agriculture, food and foodservice industries of this province.

In order to gain knowledge and technical expertise relating to the products and capabilities of Nova Scotia's food and agricultural industry, the following contacts were made on-going over the past year: producer associations, organizations and boards; meat and poultry processors/wholesalers; fruit and vegetable processors/ wholesalers; dairies; other producers and packers of Nova Scotia food commodities.

On-going contact with foodservice establishments in the province is important, so that purchasing practices and policies, food product specifications, as well as preparation and packaging requirements can continue to be monitored. A working knowledge of the foodservice market was obtained through meeting and consulting with representatives of the foodservice industry as well as government departments, agencies, organizations and associations affiliated with this industry.

Among those contacted in 1987 were: Nova Scotia Departments of Health, Social Services, Tourism and Fisheries; Nova Scotia Restaurant and Foodservices Association; Nova Scotia Chefs Association; Canadian Food Service Executives Association (Halifax/ Dartmouth Branch); Nova Scotia Dietetic Association; Nova Scotia Purchasing Agency; Tourism Industry Association of Nova Scotia; individual foodservice managers of restaurants, hospitals, homes for special care and other institutional foodservice operations.

These contacts provide Marketing and Economics Services with a firm base for market research and for implementing market development and promotional programs targetted to the foodservice sector.

2. Presentations

During 1987, this office attended a number of seminars, workshops and meetings where presentations were given. They are as follows:

- Strawberry Growers Association of Nova Scotia Annual Meeting, "Foodservice Survey of Processed Berries and Promotion '86".
- Canada Manpower, "Job Entry Skills, Agriculture and Foodservice Opportunities".
- Mt. St. Vincent University, Dept. Home Economics, "Marketing Nova Scotia Food Products" and "Program Planning and Evaluation".
- Mt. St. Vincent University, Food Service Management, "Food and Consumer Trends". (Phyllis Cipolla)
- Nova Scotia Chefs Association, "Nova Scotia Food Products and Upcoming Promotions".
- Nova Scotia Restaurant and Foodservices Association, "Presentation of Joint Promotion Plans and Discussion of Future Opportunities".
- Extension Services, N.S.D.A.M. , "Upcoming Promotions and Future Initiatives". (Linda MacDonald and Sherry Porter)

3. Liaison and Continuing Education

This office attended the following meetings, conferences, seminars and trade shows during 1987. These opportunities are much appreciated for information exchange, professional updating and a means of looking at 'old' ideas in a new light.

- Hostex Foodservice Trade Show, Toronto (Phyllis Cipolla)
- Nova Scotia Dietetic Association Conference, Truro (Phyllis Cipolla)
- Nova Scotia Home Economics Association Conference, Bridgewater (Phyllis Cipolla)
- Promise of Pork Gourmet Dinner, Charlottetown (Phyllis Cipolla)
- Atlantic Provinces Marketing Seminar, Amherst (Phyllis Cipolla)
- Exhibition Services and Supplies Trade Show, Truro
- Travelganza, Halifax
- APEX Foodservice Trade Show, Moncton

B. CONSULTATION

During 1987, this office responded to over 200 requests for information. Topics were wide ranging: Market and commodity information; source of supply; foodservice establishment listings; foodservice and agricultural statistics; food product

specifications; program planning and evaluation; survey design; technical information on food, nutrition, consumption patterns; recipes and promotional resources (tents, posters, etc.); information on funding sources. Those contacting this office included individual producers; producer associations and boards; commodity promotion specialists; N.S.D.A.M. staff; other government departments; foodservice industry representatives; wholesalers.

C. PROMOTION AND EDUCATION

1. Newsletters, Information Letters, Media

In 1987, three Focus on Food Service newsletters were produced and distributed to approximately 500 foodservice operators and other interested individuals.

No. 1 - The Extraordinary Egg (March)

No. 2 - Gathering of the Clans (May)

No. 3 - Nova Scotia Strawberry Festival (July)(Phyllis Cipolla)

The "Gathering of the Clans" newsletter was initiated at the request of Nova Scotia Department of Tourism to aid Nova Scotia foodservice operators in planning their summer menus around this Department's promotion by using Nova Scotia food products.

A monthly foodservice periodical, "Maritime Food & Beverage" was approached to feature Nova Scotia food and agricultural products and news. A program of agricultural and food features entitled "Taste of Nova Scotia" was begun. It is co-ordinated through this office and nine agricultural commodity groups are represented.

Other work in this area includes:

- "Maritime Food and Beverage" articles (3)
- Meat Month '87 press releases (3).
- Agri-Food Newsletter, Agriculture Canada (1)
- "Taste of Nova Scotia" features (3) (Phyllis Cipolla/Bela Casson)
- Information Letter on red meat for Meat Month '87.

2. Foodservice Data Base and Foodservice Directory

The foodservice data base, developed in 1985, underwent a major revision in 1987. This work was undertaken by Phyllis Cipolla and Micheline Gibson in conjunction with the development of the 3rd edition of the **Foodservice Directory**, to be published in 1988.

3. Publications

In 1987, the following publications were produced and/or distributed:

-"Food For Thought - A Buyers Guide to Nova Scotia Food Products".

-Nova Scotia Berry Sensations" - A blueberry and strawberry drink booklet for foodservice. (Linda MacDonald/Bela Casson)

-"Taste of Nova Scotia" - Consumer recipe brochure with submissions from various commodity groups. (Linda MacDonald/ Bela Casson)

-"Nova Scotia Food Products Calendar '87" for foodservice (a joint initiative between N.S.D.A.M and the Nova Scotia Restaurant and Foodservices Association funded through AFDA)

4. Promotions

In 1987, the following foodservice promotion programs were undertaken by this office:

- Meat Month '87 (a joint initiative between N.S.D.A.M. and the Nova Scotia Restaurant and Foodservice Association, partially funded through AFDA).
- Nova Scotia Strawberry Festival (Phyllis Cipolla)

Both the foregoing were extremely successful and project reports and evaluations are available through this office. The Nova Scotia Egg and Pullet Producers' Marketing Board was aided in their "VEGGIES" summer promotion (Phyllis Cipolla). Discussions and a proposal for a 1988 summer consumer promotion "Taste of Nova Scotia" was begun with the Nova scotia Department of Tourism. This program involves the promotion of Nova Scotia food products at four Tourist Information Centres around the province.

5. Audio/Visual

In collaboration with Sheila Ferguson, A.V. Technician, a multi-media slide presentation for Marketing and Economics Services was undertaken. It was entitled "Nova Scotia Food Marketing Innovations" and was presented at the Nova Scotia Department of Agriculture and Marketing Staff Conference '88.

Foodservice Photography, 1988

- Beef, pork, lamb (Sheila Ferguson, Phyllis Cipolla, Bela Casson)
- APEX trade show (Sheila Ferguson)
- On-site restaurant food shots (Sheila Ferguson/Phyllis Cipolla)

6. Trade Shows, Exhibitions

This office was represented at four trade shows/exhibitions in 1987: APEX (Phyllis Cipolla); N.S.D.A. Conference '87 (Phyllis Cipolla); Atlantic Winter Fair (Phyllis Cipolla); Food Fair Atlantic (Phyllis Cipolla).

As well, a great deal of assistance was given to many of the commodity groups in the co-ordination of their displays and food product and the development and printing of resources.

D. OTHER ACTIVITIES

Additional activities undertaken by this office in 1987 were as follows:

- -Two AFDA proposals were drafted on behalf of the Nova Scotia Restaurant and Foodservices Association: (a) Meat Month '87 (b) Foodservice Food Products Calendar.
- -A tour of the Halifax Sheraton was arranged for Home Economics Division, Extension Branch, N.S.D.A.M.
- -The Foodservice Promotion Sub-committee was initiated and made active. Its membership includes Commodity Promotion Specialists and indicates an increased interest in food-service as a viable market. (Phyllis Cipolla)
- -Chairman of the annual conference of the Nova Scotia Dietetic Association '87.
- -Work as member of the Board of Directors of Milk Nova Scotia.

III CONCLUSION

Despite a six-month leave of absence, I believe that 1987 included many viable and effective program initiatives. The efforts of all those individuals whose work helped make these activities a success is gratefully acknowledged. It is hoped that through the efforts outlined in this report, a significant impact on the food and agricultural industry of this province has been realized.

ANNUAL REPORT 1987

Peter J. Rideout, P.Ag.
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ABSTRACT

The year 1987 was one of change and challenge in the Marketing and Economics Services Branch. A number of staff changes occurred, including the arrival of Brian Smith as Director in April and the departure of Sherry Porter from the very active promotions specialist position in October. As in previous years, the Kentville office was involved in a large number of on-going and new market development activities.

Highlights of our marketing work in 1987 include our participation for the first time in the annual convention and trade show of the Canadian Fruit Wholesalers Association in Halifax. The co-ordination of early stages of planning for Food Marketing Challenges '88 during the spring and summer was a new organizational challenge for us. The increasing demand from clients for our marketing advisory services on both on-going and project bases has been particularly exciting in 1987 as we continue to forge close working relationships with the horticulture sector.

Section I of this report is a summary of our activities and areas of involvement in 1987 while section II provides a summary of marketing-related developments in the commodities under our responsibility.

I Market Development

Marketing Extension

Our direct, consultative work with individual producers/marketers or firms continues to expand and demand for these services occupied a larger portion of work time in 1987. Among others, consultations which represented a significant part of our efforts in this area included: Kingswood Condiments on positioning specialty chutneys; Nickersons Apple Bee Acres on packaging and promotion of honey; Les Southwell - development of processed fruit products; Charles Keddy - packaging of fresh strawberries; Joe Hortie - marketing fresh herbs.

As in the past, we answered a large number of requests for short-term advice from producers and the trade on supply situations, price determination and directed sales and purchase inquiries to the appropriate channels.

Direct marketing continues to be an important approach for many fruit and vegetable growers and we maintain a high level of extension services in this area. In consultation with NSDAM extension engineers we advised several new or prospective roadside stand operators on the establishment of new or expanded operations. These included the Griffiths market in Middleton; Watson Inglis, Pictou; H. Coldwell, Port Williams; and preliminary inquiries from Bernice Kenney, Glenholme and Peter Elderkin, Wolfville.

We participated in several short courses, grower meetings and special presentations in 1987, including co-ordinating a Vegetable Grading & Packing short course in Kentville and participating in the Cole Crops Production short course at NSAC. We prepared a presentation on future food marketing trends for the "Families Feeding Families" program sponsored by Womens Institutes of Kings County in April.

In co-operation with Charles Thompson, vegetable specialist, we organized a trip to the Boston, Mass. area in December for a group of Nova Scotia vegetable producers, to attend the New England Vegetable Growers Convention & Trade Show. This was a very worthwhile exercise with numerous ideas exchanged and contacts made. While in the Boston area we visited the wholesale market terminals, retail stores and roadside stands to assess market activity and identify opportunities for selling Nova Scotia produce in the region.

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Market Research

With the help of summer assistant Tina Connors, we began a revision of the Nova Scotia Vegetable Marketing Handbook in 1987. Assembled first in 1985 as a handy reference for the vegetable industry and NSDAM staff, the Handbook has seen good circulation and features statistical information on market unloads, prices, foreign imports and consumption trends as well as handy references on tariffs, regulations, freight rates and other information. Preliminary work was done on a similar publication for Berry Crops, which may be completed in 1988.

As in previous years, a significant amount of market analysis was conducted in the course of the consultations discussed earlier. The challenge to provide accurate, concise analysis of market events and trends, projections for new products or ventures and professional advice in these areas continues to grow. The Branch has addressed this demand with the staffing of a new market research analyst position. In the coming months we should continue to upgrade our information database in this area and enhance each specialist's capability in handling the increasingly-sophisticated demands of our clientele in this area of activity.

Market Information

The Marketing & Economics Branch is considered by the agricultural industry to be one of the primary sources of timely market information. In meeting our commitments in this important area, the Kentville office provides a number of services:

Market Line - a daily-updated, recorded report of market prices of fresh produce in season, including local and regional price information as well as relevent menus from central Canada and the United States.

Fresh Produce Supply Forecast - a weekly, mailed bulletin circulated to some 200 individuals and firms in the fresh produce trade, news media, direct marketers, NSDAM staff and contacts in neighboring provinces, with concise information on the supply outlook for local fresh produce. In addition to its direct circulation, the "Forecast" is supplemented by media interviews by ourselves and other staff on local produce availability and thus represents a valuable promotional tool.

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Trade Calls & Direct Inquiries - We pay particular attention to maintaining regular contacts with growers, packers, distributors, wholesalers and retailers in order to keep informed of market events as they occur. This not only provides us with valuable data for both the Market Line and Supply Forecast but enables us to respond quickly to the large number of direct telephone inquiries for detailed analysis of current markets for our various crops.

We continue to subscribe to the "Pro-Net" market information database in the United States which provides up-to-date information on a wide variety of crops at shipping points and various market destinations.

At this time, the Branch is examining options in upgrading our market information services including the addition of an in-house, public access computer database to provide market news to the growing number of clients with access to micro-computer equipment.

Organizations

Much of our market development activity continues to be channeled through the various producer and trade organizations operating within our areas of responsibility - the fresh and processed fruit and vegetable industry, the produce wholesale/retail trade, national organizations representing these industries and certain ad hoc "organizational" activities in which we are, from time to time, involved.

We were pleased to assist in planning and organizational efforts for the annual convention and trade show of the Canadian Fruit Wholesalers Association held in Halifax Jan. 31 - Feb. 3. This was the first time the CFWA, the national organization for the fresh produce distribution trade, has held its convention in Atlantic Canada. Considered an overwhelming success by all concerned, the convention attracted some 700 delegates from across North America and over 100 trade show exhibitors.

We attended the Canadian Horticultural Council's annual meeting in Ottawa, March 15-18, for the first time since assuming our responsibilities in the Kentville office. CHC is, without question, the focus point of numerous activities covering all aspects of the fruit and vegetable industry in this

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country and, as expected, attendance at the annual meeting was a tremendous learning experience providing a national perspective to many issues facing this industry.

A major acitvity in 1987 was the planning phase of our second marketing conference for the province's food industry. Work began in March on Food Marketing Challenges '88 with the establishment of a working committee and a larger, industry steering committee and members set about the tasks of setting the agenda and topics, arranging hotel facilities, engaging speakers and the many other activities involved in such an event. We carried out the duties of conference secretary and interim co-ordinator until Gordon Kinsman assumed his position as conference co-ordinator in September. Food Marketing Challenges '88 was successfully held at the Halifax Sheraton Hotel, March 6, 7, and 8, 1988.

We continued to work closely with the Wild Blueberry Association of North America in 1987, as we have done since the organization was founded in 1980. We attended the annual general meeting in Bangor, Me., in April and in the fall began working with the Canadian Domestic Promotion Committee in planning future promotion of wild blueberries.

We continue to play an active role with several horticultural commodity groups in the province. The Nova Scotia Fruit Growers Association is the most active of these groups and is involved in all aspects of the apple and pear industry. We serve on the NSFGA's Storage & Maturity Committee, the Market Development Committee and attend board of directors meetings on a regular basis. At the NSFGA convention in December a resolution was passed seeking development of an organized marketing plan before the 1988 crop year and the executive and directors began work in late December toward this end. The NSFGA undertook an extensive domestic apple promotion program in 1987. Elaine Ells was hired as a promotions specialist and organized a well-received program of in-store demonstrations, supported by newspaper advertising and package inserts.

The Vegetable & Potato Producers Association has broadened its activities in recent years to include small marketing and promotion programs, support for research and variety trials, bulk purchasing and participation in the Canadian Horticultural Council, but its impact in each of these areas is severely restricted by the lack of an effective means of generating its own funds. The

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vegetable industry accounts for a major portion of our work time and we participate in VPPA directors meetings and marketing & promotion planning.

We attended the annual meeting of the Blueberry Producers Association in November. Having long been a production-oriented group, BPANS is increasing its role in market development through support for fresh fruit sales, effective intra-provincial promotion of wild blueberries and strong support and recognition of WBANA activities nationally and internationally.

In addition to the aforementioned groups, we continued active liaison with several other producer organizations, including the Strawberry Growers Association, which has become stronger and more active in the past three years, having recovered from a severe financial pinch. We participated in discussions at the Greenhouse Growers Association fall meeting leading to the eventual drafting of a greenhouse vegetable marketing plan proposal. The potentially disastrous market implications of the Newfoundland Enviroponics greenhouse under construction near St. Johns have been of great concern to Nova Scotia growers and these fears were borne out with the arrival of low-priced Newfoundland-grown English cucumbers on the Nova Scotia market early in the 1988 season.

A number of meetings of the Highbush Blueberry Growers Association were held in the summer and fall of 1987 to discuss possible action following severe injury to plantings the previous winter. At the association's and this department's request we assisted berry crops horticulturist Bob Murray in preparing marketing and production statistics as a measure of the potential financial loss to this industry.

The Farm Organizations Joint Services Society, with offices in Blair House, Kentville Research Station, continues to provide effective management and clerical services to its six member organizations. A new secretary-manager, Sonya MacKillop assumed her duties late in 1987 and the office is able to obtain summer student assistance to help with seasonal programs. Although the office runs on a tight budget, due to the limitations of some member-groups, it provides a level of professional service unattainable under the previous voluntary, part-time secretary/ treasurer system of these commodity groups.

The Atlantic Fresh Produce Association is essentially the eastern chapter of the CFWA and, along with its partner organization, the Atlantic Fresh For Flavour Foundation, co-ordinates a number of fresh produce promotion activities

in Atlantic Canada. The AFPA is perhaps most valuable as a forum for discussion of issues affecting the produce trade in this region. We attended the annual meeting in St. John's in October which, as usual, provided a valuable opportunity to meet with our various trade contacts. The organization has become much broader in recent years and encompasses the more market-active grower/shippers in the region, truckers, brokers, retail representatives, U.S. and other Canadian suppliers as well as provincial government marketing staff. In view of this apparent need, the organization is considering broadening its base to officially recognize these other interest groups and we have been asked to participate and advise in these deliberations.

As in previous years, we served as secretary of the processing pea contract negotiations and of the processing bean contract negotiations held for the first time under the provisions of the newly-formed Processing Bean Marketing Board. The pea and bean boards merged into one body later in 1987.

In April we attended a public hearing in Charlottetown convened by the National Farm Products Marketing Council to hear comments on a Canadian potato marketing agency with supply management powers, as proposed by a task force of the Canadian Horticultural Council. Nova Scotia Potato Marketing Board chairman Clifford Meek presented a brief in support of the agency proposal. In its report on the hearings, issued late in 1987, Council recommended establishment of such an agency without immediate supply management and price setting authority.

Regular activities of the Market Development Committee of the Canada-Nova Scotia Agri-Food Development Agreement wound up in the spring of 1987 although we continued our responsibilities as project advisor with a number of applicants whose projects extended beyond the March 31 commitment date.

Our NSDAM Marketing and Economics Branch hosted the annual meeting of marketing extension staff from the four Atlantic Provinces in Truro, June 16-18. In keeping with the training and development theme these meetings have assumed, we arranged a one-day seminar by Toronto communications specialist Hugh Rennie on "Presentation Skills for Professionals". The program also included a half day food processing technology session conducted by Dr. Robert Stark and Rick Lawrence, Agriculture Canada, Kentville.

II Commodities

Vegetables

A very dry growing season in 1987 was offset by extensive use of irrigation on many vegetable crops in the province and generally above average yields were obtained. The farm value of the vegetable industry in 1987 was estimated at $15.5 million, up $2.5 million from the previous year. Market conditions were generally good for most vegetable crops, although more intensive inter-provincial competition was experienced with some items.

Record breaking yields of fall cabbage put growers in a good supply position for winter marketing although market prices were lower than previous years and rallied only as inventories were nearly depleted. Some quality problems were encountered, believed caused by the stressful growing season.

A large crop of carrots for processing was harvested, due to good late growth in September. Unfortunately, the quality of fresh market carrots was lowered by the dry conditions in mid summer. Fresh market carrot prices were generally below average during the winter shipping period.

Potato growers received average prices for early market offerings in July and did not experience the intense competition from out-of-province sources of the previous year. This crop perhaps benefitted most from irrigation, setting up good yields of chip stock potatoes, now mostly the Norchip variety.

Production of beans for processing dropped sharply in 1987 due to Cobi Foods' allocation of larger bean acreage to its Ontario plants. Bean yields were up from 1986 levels but grower profitability remained marginal at the $.09/lb. farmgate price.

Marketing problems continue to hamper local field tomato production efforts as smaller growers have trouble breaking into a market already competitively and consistently served by out-of-province product. A number of promising varieties were field-tested in 1987 with samples provided to several foodservice outlets for evaluation. Results were promising, particularly for the cultivar "Hybrid 31".

Interest in a number of specialty crops continues to grow. We yielded several inquiries into marketing of fresh herbs and observations in some terminal markets indicate increasing demand for these items. Production of white endive

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by Jan Punt, Milford Stn., expanded to eight acres of roots. A substantial portion of this crop is being exported to St. Pierre et Miquelan while domestic retail sales are increasing gradually.

New marketing organizations continued to progress in 1987. Kings Produce, Canning, extended its product line from members and outside growers to more than twenty produce items with shipments made throughout Atlantic Canada and the eastern U.S. Nova-Agri Associates now a wholly-owned division of Dykeview Farms, officially opened its Hillaton storage and packing facility in mid-summer. The facility can accomodate some 10 million lbs of chip stock potatoes and includes additional cold storage, CA rooms and a washing/sizing/packing line for table potatoes. Unfortunately, 1987 also saw the closure of Harvestcorp Foods Inc. Established the previous year as a pre-cooling/packing/marketing facility for local produce, the operation suffered from low-volume combined with high capital and overhead costs.

Tree Fruit

A pre-bloom frost in early May reduced the apple crop especially Gravenstein, and production of stone fruit was also reduced. Final apple production estimates however, remained well above the sharply frost-reduced levels of 1986. The dry growing areas also created fruit size and quality problems which showed up throughout the marketing season. Markets were stagnant throughout the fall/winter shipping season due to both local competition and global factors. A record 100 million bushel crop in Washington State put severe pressure on apple markets throughout North America and to some extent in Europe and the Far East. Low prices for Red Delicious affected B.C. and Ontario sales and put a ceiling on price expectations for McIntosh. As mentioned earlier, intense price competition among a large group of sellers at the local level continues to be a major constraint to achieving market stability in Nova Scotia's apple industry. Steps were taken to develop an organized marketing plan for apples under the Natural Products Act and a producer plebiscite on the plan is expected in 1988.

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TABLE I Nova Scotia Tree Fruit Production 1987, 1986, bushels

	1987	1986
Gravenstein	200,000	110,000
McIntosh	1,000,000	780,000
Cortland	350,000	300,000
Red Delicious	300,000	260,000
Spy	240,000	250,000
Others	810,000	700,000
Total Production	2,900,000	2,400,000
Pears	70,000	60,000
Plums	7,000	7,000

Prices paid for peeler apples were stable to slightly lower in 1987, as seen in Table II. Juice apple prices were reduced sharply to $4.00/cwt for hard varieties.

TABLE II Processing Apple Prices, Nova Scotia, 1987[1] $/cwt

	2-1/2" & up		Cider	
	1986	1987	1986	1987
Class A	$9.00/cwt	$8.00/cwt	$6.00/cwt	$4.00/cwt
Class B	$7.25/cwt	$7.50/cwt	$6.00/cwt	$4.00/cwt
Class C	$7.25/cwt	$6.75/cwt	$6.00/cwt	$4.00/cwt
Class D	$7.25/cwt	$7.50/cwt	$6.00/cwt	$3.50/cwt

"A" = Spys

"B" = King, Cortland, Ribston, Greening, Ben/Gano, Idared, Wayne, Rome, Granny St. Splendor

"C" = McIntosh, Golden Delicious, Wagners

"D" = Gravenstein

SOURCE: W.E. Craig, Tree Fruit Specialist, NSDAM

Berry Crops

Nova Scotia's strawberry crop, at 3.5 million quarts, remained below normal in 1987 due to some spring frost losses and weaker stands. Dry conditions reduced yields in some areas, particularly where irrigation was not available.

Strawberry market conditions were generally good with the reduced volume and movement through wholesale channels was reasonably steady. Demand at pick-your-own farms remained fairly constant as a percentage of the crop. There were no significant exports of fresh strawberries in 1987. Sales to the Newfoundland market continue to show steady growth in both truck and air shipments but incidents of inadequate refrigeration enroute persist and are an impediment to increased sales. Use of corrugated 8-quart master containers is increasing, particularly for out-of-province and air shipments. The 1987 strawberry market summary is included as Appendix A.

Shipments to processors were down slightly from 1986 and markets for frozen strawberries were down sharply from the buoyant 1986 price level, due to renewed, aggressively-priced imports.

The dry growing season was the main factor in Nova Scotia's reduced wild blueberry crop in 1987 as average fruit size was generally smaller than normal years. Overall production of wild blueberries was generally good, particularly in Maine and Quebec. Market prices at both producer and processor levels were strong and most frozen inventories had been sold or committed by mid-winter. Overseas sales of wild blueberries continue strong, particularly in West Germany and other European countries, and to a lesser extent Japan and the Far East. The blueberry industry, through WBANA,while maintaining a high level of overseas promotion and market development, is placing greater emphasis on the under-served North American market. Promotional work aimed at potentially large industrial users is on-going in both Canada and the U.S.

Locally, interest in developing markets for fresh wild blueberries continues to grow. A number of different methods of cleaning and packing are in use, with some variation in the quality of fruit shipped. Light shipments to the Toronto area were made in 1987 as well as some encouraging sales to the Boston area.

The vast majority of the province's raspberry crop continues to be sold on a pick-your-own basis with only light supplies to the wholesale trade. Opportunities exist for raspberries in both the supermarket and foodservice channels but a suitable, good-shipping variety has not been found, although some evaluation continues at the Kentville Research Station.

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The province's fledgling wine industry continues to progress and both of the cottage wineries are successfully marketing their produce through direct sales and the conventional distribution system. Also, a considerable amount of private labelling is being done with the region's hotel/restaurant trade. Products of Jost Wines and Grand Pre Wines have both won international awards for quality in the past year and have participated in trade shows across the country.

Greenhouse Crops

Considerable attention was given to development and modernization of the province's greenhouse industry infrastructure during the Commodity Development Strategy process in the winter of 1986/87. It is generally felt that the industry, in achieving energy efficiency during the 1970's and early 80's, shipped behind in other production aspects of this high technology sector. Plant modernization is occuring however, as exampled by a new half-acre range opened recently at Avon Valley, Falmouth.

The province's two major cut flower/pot plant producers continue to market successfully in the Atlantic region and, to some extent, in Quebec and New England.

Bedding plant and nursery sales continue to expand, partly as a function of generally-improving economic prosperity and a growing interest in both residential and institutional landscaping.

The province's greenhouse vegetable industry has been pre-occupied in 1987 with concern over a planned large-scale greenhouse project in St. Johns, Nfld. Newfoundland Enviroponics, jointly owned by the Newfoundland government and Sprung Enterprises of Calgary, was under construction in the fall of 1987 and began shipments in the spring of 1988. The Nova Scotia greenhouse industry expressed deep concern over the effects of a sudden, large increase in greenhouse vegetable offerings on the relatively small Atlantic Canada market. In the face of anticipated increased competition, the province's greenhouse vegetable growers began developing an organized marketing plan in the fall of 1987, with a grower plebiscite expected in the spring of 1988.

APPENDIX A

Market Distribution of Nova Scotia Strawberries

- (000's qts.) -

Year	N.S. Fresh Sales	Other Prov's. Fresh	Export	Processing	Total
1987	2,962	261	-	277.2	3,500
1986	2,843	378	-	297.	3,500
1985	4,435.8	271.2	42.	251.	5,000
1984	4,154.4	342.	-	500.	5,000
1983	3,687.	180.	-	433.	4,300
1982	3,627.	138.3	-	234.7	4,000

Percent Distribution of Strawberry Marketing, Nova Scotia

Year	PYO	Wholesale	Other Prov's. & Export, Fresh	Processing
1987	35	49.6	7.5	7.9
1986	30	50.7	10.8	8.5
1985	35	53.7	6.3	5.0
1984	40	43.1	6.9	10
1983	55	30.8	4.2	10
1982	68.7	22.0	3.4	5.9

Compiled by: Marketing & Economics Branch
N.S. Dept. of Agriculture & Marketing
Kentville, N.S.

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1987 Unloads, Nova Scotia Strawberries, Halifax, Sydney
Quarts

DATE	HALIFAX QTY(Qts.)	HALIFAX W/S Price	SYDNEY QTY(Qts.)	SYDNEY W/S Price
June 22	2,584	2.25	-	-
23	4,964	2.25	-	-
24	8,900	2.25	-	-
25	5,964	2.15-2.25	6,160	2.20-2.59
26	7,560	2.15-2.25	-	-
29	19,316	1.95-2.00	15,300	2.00-2.20
30	15,312	1.90-2.00	4,020	2.00-2.10
July 1	10,500	1.70-2.00	1,200	2.00
2	33,000	1.70-2.00	15,660	2.00
3	38,500	1.70-2.00	13,140	1.70-1.85
6	17,040	1.60-1.90	5,400	1.60-1.70
7	6,796	1.50	8,780	1.50-1.60
8	7,564	1.25	7,500	1.50-1.55
9	14,480	1.25-1.50	10,020	1.50-1.55
10	21,840	1.15-1.50	12,480	1.50-1.55
13	8,136	1.35-1.55	10,040	1.30-1.99
14	10,080	1.35	2,640	1.50-1.55
15	8,416	1.30-1.35	6,960	1.50-1.55
16	10,787	1.05-1.35	-	-
17	7,668	1.05-1.35	-	-
20	6,068	1.35	-	-
21	2,040	1.35	1,200	1.25-1.55
22	8,136	1.35	-	-
23	2,100	1.35	-	-
Total N.S. unloads	277,751		120,500	
Total 1986 unloads	299,036		115,984	
1987 Change	-21,285 (-7.1%)		+4,516 (+3.7%)	

1987 Halifax average W/S Price $1.69/qt.

1987 Sydney average W/S Price $1.78/qt.

Weighted average Nova Scotia W/S Price $1.72/qt.

Compiled by: Marketing & Economics Branch
N.S.D.A.M.
Kentville, N.S.

SOURCE: NSDAM and Agriculture Canada Data

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1987 Daily Unloads, Nova Scotia Strawberries,
Saint John, Moncton (Quarts)

	SAINT JOHN		MONCTON	
DATE	QTY(Qts.)	W/S Price	QTY(Qts.)	W/S Price
June 24	-	-	4,000	2.10
25	-	-	-	-
26	-	-	-	-
29	-	-	-	-
30	-	-	-	-
July 2	-	-	300	1.65
3	-	-	3,348	1.65
6	-	-	-	-
7	-	-	5,768	1.65
8	-	-	5,924	1.47
9	-	-	7,972	1.39
10	-	-	11,040	1.33
13	-	-	8,048	1.32
14	2,880	1.15-1.20	4,080	1.32
15	-	-	3,980	1.27
16	-	-	7,732	1.30
17	2,400	1.15-1.20	4,260	1.28
20	-	-	4,140	.99-1.30 mostly 1.20
21	500	1.29-1.69	3,420	1.30
22	-	-	2,580	1.99-1.30
23	-	-	2,460	1.25
24	-	-	2,676	1.19-1.30
Total N.S. Unloads	5,780		79,708	
Total 1986 Unloads	7,840		203,453	
1987 Change	-2,060		-123,745	
% Change	-26.3%		-60.8%	

1987 Moncton average W/S Price $1.42/qt.

1987 Saint John average W/S Price $1.38/qt.

Weighted average New Brunswick $1.41/qt.

Compiled by: Marketing & Economics Branch
N.S.D.A.M.
Kentville, N.S.

SOURCE: NSDAM and Agriculture Canada Data

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1987 Daily & Total Receipts of New Brunswick Strawberries
On Two N.B. Markets
(Quarts)

DATE	SAINT JOHN QTY(Qts.)	SAINT JOHN W/S Prices	MONCTON QTY(Qts.)	MONCTON W/S Prices
June 24	3,300	1.60-1.80	5,572	2.10
25	3,720	1.70	6,072	2.00
26	3,000	1.70	3,760	1.65
29	5,940	1.60-1.70	4,380	1.73
30	5,700	1.40-1.50	1,920	1.62
July 2	4,320	1.25-1.40	2,400	1.55
3	6,000	1.25-1.40	9,048	1.65
6	4,800	1.25-1.40	1,020	1.50
7	3,000	1.25-1.40	6,728	1.55
8	5,540	1.25-1.40	7,484	1.47
9	4,500	1.25-1.40	7,972	1.39
10	4,080	1.25-1.40	11,040	1.33
13	4,000	1.40-1.50	6,048	1.32
14	8,040	1.21	4,938	1.32
15	-	-	7,452	1.27
16	1,800	1.15	7,732	1.30
17	3,360	1.19	6,780	1.28
20	1,500	1.23	4,140	1.20
21		1.29-1.69	3,420	1.30
22	-	-	3,060	1.19-1.30
23	-	-	3,180	1.25
24	-	-	4,056	1.19-1.30
Total N.B. Unloads	72,600		118,202	
Total 1986 Unloads	116,418		27,408	
1987 Change	-43,318 (-37.2%)		+90,794 (+331%)	

1987 Saint John average W/S Price $1.38/qt.

1987 Moncton average W/S Price $1.42/qt.

Weighted average New Brunswick W/S Price $1.41/qt.

Compiled by: Marketing & Economics Branch
N.S.D.A.M.
Kentville, N.S.

SOURCE: NSDAM and Agriculture Canada Data

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1987 N.S. average grower price calculation

PYO	1,225,000 qt	@	$ .82	$1,004,500
Wholesale	1,736,000 qt	@	$1.38	2,395,680

N.S. wt. avg. w/s price	$1.72/qt.*
less comm. & freight	-.20
less boxes & flats	-.14
	$1.38/qt.

*from Halifax & Sydney market info.

Processing	277,189 qt	@	$ .64/qt.	177,652
				$3,577,832

wt. avg. N.S. grower price = $\frac{\$3,577,832}{3,239,000 \text{ qt}}$ = $1.105/qt.

ANNUAL REPORT 1987

David M. Smith, P.Ag.
Marketing Specialist

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

INTRODUCTION

Because our new Director was not appointed until mid-March, this office continued to fill that vacancy from the beginning of the year until that time.

As a result, our usual responsibilities received lesser attention for the first part of the year.

MARKET INFORMATION

Market Report - This report of local agricultural product prices is assembled and mailed on a bi-weekly basis to approximately 1500 producer, government personnel and agri-business interests. This is a slight increase over last year's mailing list.

Along with the high-profile products we endeavor to anticipate the needs for price information of low volume items for those attempting new product development. Such items as gooseberries and asparagus, while not warranting season-long recording, producers request opening market information.

The market comments section of our Market Report gives us additional latitude to inform producers and others of additional market information which we think might be pertinent to the N.S. industry. On a few occasions we get follow-up requests for further information relative to our comments.

Market Update - This publication was continued in 1987. Because of illness and additional commitments publication was limited to seven issues.

Marketing Facts - One issue was produced in 1987 by Ray Foote entitled "Nova Scotia Foodservice Profile" and was mailed mainly to Department personnel.

Other - This office continued to receive requests for assistance in price information and market outlets usually for low-volume products.

One such request came from a summer resident of Caribou Island who has set out 3 acres of asparagus. This appears to be an ongoing development and a rather heavy commitment for this product in Nova Scotia. We shall be following this up with interest.

A request from Antigonish County for market information on garlic was

received. We visited this grower and they have a high-quality product. They marketed in Antigonish town but production thus far is small.

As in other years, we answered requests from academics who are doing surveys or research in the area of agricultural marketing. These requests can be time-consuming but our Market Report Annual Summary has relieved much of this.

SCHOOL MILK PROGRAM

The School Milk Program continues to be well accepted by the schools and particularly by the dairies. A total of 547 schools registered for the 1987-88 school year out of an eligible 582 schools.

The subsidy paid by the Department of Agriculture and Marketing for the school year 1986-87 totalled $1,640,641. This was $136,000 over the budget for that period and down $281,000 from the previous year. The drop reflected the student-price increase to twenty cents.

In an effort to combat the increasing soda pop sales in the schools, the dairy industry appealed to the Program to have chocolate drink included in the subsidized program. Heretofore, this idea has been vetoed by the Department of Health. A meeting was held which included personnel from the Departments of Health, Education, Agriculture & Marketing and personnel from the dairy industry and Milk Nova Scotia. Departments of Health and of Education remained adament in their belief that chocolate drink should not be included in the Program. Without this support, the dairy industry elected to withdraw this request.

Milk Nova Scotia, the industry-run promotion arm, continued in an active program of promotion in the schools.

The various segments of the Halifax Association For Improving The Conditions of the Poor sent us letters of appreciation for our co-operation in making milk available at a reduced cost.

TARIFF

This office continued to administer the seasonal tariff application and removal on imported fruits and vegetables for the Maritime Tariff Zone.

For the 1987-88 season, the following tariffs were utilized:

	Applied	Removed
Snap Beans	7/28	11/3
Beets	8/5	1/25
Broccoli	7/10	10/30
Cabbage NOP	7/28	3/31
Carrots NOP	8/21	3/31
Cauliflower	7/10	11/27
Corn-on-Cob	8/5	10/28
Cucumbers NOP	7/10	10/27
Onions & Shallots GRN	10/22	12/29
Onions & Shallots	9/11	
Pears NOP	9/11	1/25
Peas	7/28	10/20
Strawberries NOP	6/19	8/14
Tomatoes NOP	7/10	10/27

We were advised by Hort Council of several dirty-drawback requests made by importers. In no case did these importations infringe or threaten the markets for our products.

REGULATIONS

As administrators and advisors to the Minister regarding the Nova Scotia Fruit and Vegetable regulations we maintained our liason with the federal inspectors who enforce our regulations.

During the year the inspectors detained 100 lots of produce for being under grade. Most of these related to apples.

Shipping Point Inspection - We assisted the Nova Scotia Fruit Growers Assocation in setting up a shipping point inspection service. This included providing our Department with an operations estimate and interviewing position applicants. Following this, we outlined the duties of the shipping point inspector with the successful candidate Gerry Kennie.

In 1987 we legislated the 2 litre and 4 litre open baskets into our regulations as well as 10 lb. bag for apples.

Our Minister authorized an experimental test for "canner" grade for tomatoes and a 2 kg carton for small potatoes.

After much amending by the industry, the CA designation regulations for apples was finally assembled and was duly passed into our Fruit and Vegetable Regulations.

We gave a seminar for vegetable packers on the topic of regulations and seasonal tariffs.

While at the Hort Council annual meeting we attended a meeting called by Agriculture Canada Inspection Service. Here concerns were aired regarding enforcing Provincial regulations.

We did some periphery research on possible hay grades. However we are leaving these to be developed by the Soils & Crops Branch.

SPECIAL PROJECTS

Blueberry Meetings - On behalf of a group of fresh blueberry packers we organized and chaired a series of marketing meetings. These meetings served as information exchange sessions regarding crop prospects, packaging, promotion and pricing. Full attendance at each meeting would indicate that these meetings were serving a useful purpose in their marketing endeavors.

Maritime Marketing Meeting - This annual meeting of our counterparts from the Atlantic Provinces met in Truro in 1987. This office co-ordinated a co-operative Branch effort in organizing the meeting and program. All personnel of the Branch were involved in contributing to some facet of the Program.

Food Safety Advisory Group - Represented Nova Scotia government at a national meeting where food regulations are being examined as per the recommendations of the Neilson Report. It appears that Agriculture Canada wants to play a less-expensive role in this area.

Forest Mushrooms - We continued to provide information and assistance in the marketing of chanterelle mushrooms. However, the continued dry weather before and during the harvesting season, caused production to virtually cease in 1987.

One West Coast shipper set up a drying operation in Trenton but was unable to obtain raw product.

Frozen Blueberry Promotion - For the first time in several years, we were not actively involved in a fall promotion of frozen blueberries on local markets. No interest was shown within the growers organization or the processors.We suspect the return of the strong processing market diverted this interest. However some stores did feature during October and WBANA attempted a promotion on the Canadian

market. In doing this the trade worked directly with the processors - which is as it should be.

MISCELLANEOUS

Bark - An entrepeneur requested us to survey all those who might be supplying saw-mill bark to local nurseries who use it for mulching. This we did coming up with three names and addresses.

Atlantic Winter Fair - Assisted in setting up our booth and did two shifts of manning during the Fair.

Hort. Council - Attended the annual meeting of Canadian Horticultural Council, Ottawa. Served on two committees and met with those concerned with provincial regulations.

Maple Sales - Worked with a Truro packer in attempting to hold the price. Sellers are weak in the market and tend to clean up in a hurry.

Radio - Filled in on two occasions for the vacationing Frank MacDonald in giving the Friday cattle report on Radio Noon.

ANNUAL REPORT 1987

Laurie D. Thompson
Marketing Specialist (Promotion)

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

INTRODUCTION

This report will highlight activities performed by the Marketing Specialist in promotions for the Marketing & Economics Branch, Nova Scotia Department of Agriculture & Marketing.

Duties carried out for the period January 1 - December 31, 1987 fall into the categories listed below:

I Promotion and advertising

II Trade shows, exhibitions and malls

III Public Relations

IV Special conferences, events and seminars

V Market development

VI General

I PROMOTION AND ADVERTISING

Commodity boards and associations met with the department to discuss promotional activities planned for the coming year. As in the past, Nova Scotia Department of Agriculture and Marketing allocated promotional grants to these groups based on need.

Of the approximately fifteen commodity groups, all are at different stages of development and require different levels of support. The commodity groups, especially the smaller ones, have been encouraged to take advantage of the Agrifood Development Agreement, Market Development program, for extra funds. As a result, there has been increased promotional activities for those groups which applied for AFDA grants.

The following major promotions were undertaken:

(a) RECIPE DEVELOPMENT

Recipe development work was contracted to a Marketing Assistant who worked with the commodity groups in question. Keeping in mind the trend towards light, lean and nutritious food, the marketing assistant developed and tested new recipes to suit today's active lifestyle. Work was completed for turkey, strawberries, vegetables, lamb, maple, honey, potatoes and blueberries. The Taste of N.S. brochure received a facelift and is now an attractive cookbook containing recipes from each of the commodity groups.

(b) PHOTOGRAPHY & GRAPHIC WORK

Our office continued to work with commodity groups and N.S. food companies in developing quality photography for new brochures, posters, etc.

More specifically, the Fruit Growers Association received assistance in developing new P.O.P. material (i.e. price cards, polybag inserts, apple folders, apron , brochures, and an attractive new poster). Graphic work for cooperative food shows was completed for several commodity groups as well as new signage for display booths.

(c) IN STORE DEMOS

In 1987, the apple producers put together a rather extensive in-store promotion campaign beginning in late August and continuing through to March 1988. This office worked together with the Fruit Growers ASsociation in designing the campaign which according to Elaine Ells, Marketing Assistant with the Fruit Growers, was a great success in promoting "Nova Scotia's Finest" to consumers. The Association plans to build on this promotion in 1988-89. In-store demos were also conducted by turkey, strawberries, lamb, pork and eggs.

(d) **MILK NOVA SCOTIA**

This new organization in its second year of operation began to establish itself as a valuable promotion and marketing branch of the Dairy Bureau of Canada. Its affiliation with the Nova Scotia Athletic Federation as a corporate sponsor was a very positive step for Milk Nova Scotia. There was a new media buy for the fall which built on the "Milk, yeah Milk" T.V. commercials. A variety of nutrition education seminars were conducted and the School milk program expanded to increase participation in elementary and Junior and Senior high schools.

This office continues to act in an advisory capacity to the Board of Directors of Milk Nova Scotia.

(e) **TURKEY**

The Turkey Boards request for AFDA funding was turned down because of its reference to possible discount refunds to wholesalers and processors. With a 39 percent increase in quota, it is even more important to move more fresh product.

The Turkey Board met with wholesalers and retailers and both agreed that there should be more emphasis placed in the promotion and marketing of turkey parts.

The period between May through August was identified as a very slow period and therefore an excellent time to promote turkey. More consumer education is required (i.e. recipes for turkey parts, buying and storage information etc.)

The "Turkey in March" national campaign will continue and quality P.O.P. material will be distributed on a national basis.

(f) **PORK**

The Maritime Pork Promotion sub-committee planned and executed a major foodservice promotion in Charlottetown, P.E.I. Over 100 invited foodservice operators, media and government representatives from around the Maritimes attended a gourmet, 7 course pork dinner prepared by members of the P.E.I. Chefs de Cuisine.

As well, a Maritime workshop for meat managers and cutters was held in Moncton to demonstrate new pork carcass cutting techniques.

(g) **STRAWBERRIES**

The summer strawberry campaign consisted of a series of press

releases which were sent to food editors and all Nova Scotia newspapers.

In-store demos were conducted throughout the province with assistance from the Federation of Agriculture's promotion assistants.

Ads were placed in the Chronicle Herald and an article was written for Maritime Food & Beverage.

(h) **BLUEBERRIES**

A new Secretary/Manager was hired - Raylene Nash. She discussed plans for a coordinated promotion(i.e. a new poster, marketing brochure, recipe book and foodservice material).

The largest undertaking for the Blueberry Producers Association was the operation of the "Blueberry Patch", an information module at the Tourist Information Centre in Amherst. Information on growing, recipes, and samples were given out to approximately 250,000 tourists throughout the summer.

Other activities of the Association included participation in APEX, the Nova Scotia Dietetic Conference, Canada Winter Games in Cape Breton and Blueberry Festivals.

(i) **WBANA**

Annual meeting was well attended by growers and there were attendees from all five eastern Canadian provinces.

Canada appears to be getting more mileage out if its dollars spent on promotion of wild blueberries than the U.S. even though Canada has less than a quarter of U.S.'s expenditures on promotion.

The Research & Development Committee introduced new initiatives in blueberry research (i.e. commercial fruit dryers and CA storage.)

There are excellent opportunities for expansion in the UK market. WBANA participated in shows in Europe, Japan, Singapore andItaly and market identification work is being conducted in Hong King, Australia and New Zealand.

There have been some significant gains made with respect to purchase of more wild blueberries (eg Sara Lee's new frozen blueberry cheescake and Marvelous Muffin's blueberry muffins)

In Canada, WBANA was involved in several foodservice trade shows including APEX, Hostex & Rendezvous.

(j) **ATLANTIC FRESH FOR FLAVOR**

Atlantic Fresh For Flavor Foundation cooperated with the Canadian Cancer Society on a "Broccolive" Campaign in January. For every head of broccoli purchased at a participating store, 15¢ was donated to the Canadian Cancer Society. In total, $6,434.00 was raised for cancer research. Our office was involved in producing ads for the campaign.

Retailers indicated that sales of broccoli stabilized at a high level during a time when broccoli sales are usually up and down.

A meeting was held to set up a committee which would coordinate local promotions for the Fresh for Flavor Association. This committee consisted of retail produce buyers from the major chains, wholesalers, 2 government marketing representatives, and the president and secretary of the Association. This committment to work together was indeed a positive step.

A national potato marketing and promotion program was devised. N.S.D.A.M contributed $1,100.00 which has allowed us to access quality promotional material

Theme for 1987 was "Canadian Potatoes Have Appeal". The Potato Marketing Board in Nova Scotia is supportive of the national campaign but has not been able to commit any dollars yet. Perhaps more funding can be obtained from AFDA.

(k) **ATLANTIC INSIGHT RECIPE TESTING**

Our office was responsible for testing recipes in two categories of the Atlantic Insight's Heritage Recipe Contest.

Semi-finalists participated in a cook-off at the Culinary Institute in Charlottetown.

(l) **ADVERTISING**

This office coordinated general advertising of the N.S.D.A.M. Some of our larger advertising activities included:

1. Atlantic Insight - a full page, full color ad in July to coincide with the Heritage Recipe contest. (Bought an additional 10,000 overruns @ $1,500.00 to supplement our promotional literature)

2. **Chronicle Herald** -advertising supplement in late March included articles from the Marketing Branch, several commodity boards and an ad placed by N.S.D.A.M.

3. **Evangeline Trail Harvest Guide Map** - U-pick operations, roadside markets, and farmers' markets located on the Evangeline Trail.

Ads were also place in Exhibition books, Weekly Record Farm Focus.

II TRADE SHOWS, EXHIBITIONS AND MALLS

(a) CFWA

The Canadian Fruit Wholesalers Association held their annual convention in Halifax. There were 670 convention delegates, 97 exhibits and speakers from the Grocery Products Manufacturers, Fresh for Flavor and Ryerson College.

Good business contacts were made by our Nova Scotia growers (Bruce Rand & Richard Melvin made contacts in the Boston market). There was much interest generated in our greenhouse industry and production of endive. Sobeys were impressed with our display of Nova Scotia produce and will become a more active participant in local promotion events.

Grand Pré Wines were contracted to produce a wine with special label for the convention. Wine and fruit baskets were placed in the delegates rooms.

Media exposure included a five minute segment on Live at Five, interviews for the Chronicle Herald, and a spot on the CBC evening news.

(b) APEX

The Atlantic Provinces Restaurant Show was held in Halifax in 1987 and this office acted as coordinator for commodity group participation. Displays included turkey, eggs, blueberries, beef, apples, pork and Fresh for Flavor.

Attendance was down a bit this year because of poor weather conditions. However, interest in our products was high and important contacts were made. Sara Lee's new blueberry cheescake was introduced at this show.

(c) FOOD FAIR ATLANTIC

The N.S.D.A.M exhibit at Food Fair Atlantic was very well received by consumers. A consumer taste testing

panel was set up to evaluate some new products developed by our local processors. These included:

Paté
Roast Beef
Lamb Sausage } Tony's Premium Meats

Forfar Bridies - Scottish Bakers

3 Fruit Chutneys - King's Wood Condiments

Berry Best Yogurt - Peninsula Farm

The exhibit also consisted of a display of fresh, local produce and novel items such as oyster mushrooms, chanterelles and herbs.

(d) **CANADIAN FOOD & BEVERAGE SHOW**

This new exclusively food trade show was well received. This office worked with Farmer's brokerage firm in Toronto. Some valuable contacts were made with respect to Farmers UHT milkshakes and interest in finding markets in Europe was stimulated.

Because this is strictly a food show, our department may wish to consider participating in this event rather than Hostex which is a food and equipment trade show. Perhaps N.S.D.A.M could assist our local processors who would like to participate in the show.

(e) **HOSTEX**

This office worked with the WBANA display and promoted Sara Lee's new blueberry cheescake. The supplier of blueberries for the new product is Oxford Frozen Foods.

A work trip to Hostex was arranged by this office for several meat commodity board representatives, meat wholesalers and processors. Beef, pork and lamb promotion specialists appreciated the opportunity to attend Hostex and keep track of new product development with respect to red meat.

(f) **BERMUDA-CANADA SHIPPING LINE**

Captain Michael Pym was asked to evaluate the feasibility of purchasing an ocean going vessel for trade purposes to Bermuda. There have been some problems in the past with shipping berries via New York and Sydney. A direct Canada to Bermuda shipping line was explored as a possible alternative.

(g) **EXHIBITIONS**

The N.S.D.A.M participated in the 1987 version of the Atlantic Winter Fair in Halifax. This year, the fair

was split in two sections with the first half being general in nature and the second half having a kid's world theme.

Space was limited and therefore commodity participation was on a first-come-first-served basis. Those who participated included pork, eggs, strawberries, lamb, vegetables, and turkey.

Government Services were asked to construct a new N.S.D.A.M exhibit for the Fiar. An agricultural quiz was set up for consumer interest and use. The show was well attended.

With respect to the Maritime Winter Fair, our department has been approached to help support N.B. agriculture in its efforts to continue its Food Fair promotion. The Show's major sponsor, Food Village has pulled out and therefore more money may have to come from individual commodity groups.

(h) **MALL DISPLAYS**

N.S.D.A.M coordinated four mall promotions throughout Nova Scotia in 1987. Locations included Sydney, New Minas, New Glasgow and Halifax.

The commodity groups are looking for alternatives to mall promotions for the coming year and will be meeting in the fall to make plans. This office has been asked to be involved in future planning meetings and subsequent promotions.

III PUBLIC RELATIONS

(a) **Agricultural Awareness Program**

A video and school teaching guide were developed in 1986 under the auspices of the Maritime Farmers Council and the Atlantic Provinces Chamber of Commerce. This ag awareness program was then made available to the schools and the video was also used for presentations to service clubs, community groups, WI etc.

A master copy of the video "Agriculture is Everybody's Business" was presented to the Maritime educator's committee. Each provincial Department of Education will copy the master and send tapes out to all participating schools.

(b) **Nova Scotia Dietetic Association Conference**

This office helped coordinate a Nova Scotia Department of Agriculture and Marketing display for NSDA's annual conference in Truro. Various commodity groups participated and took turns working the display. The 200 or more dietetians on hand were able to obtain current nutritional information from those commodity groups represented as well as some new recipe ideas suitable for institutional use.

IV SPECIAL CONFERENCES, EVENTS AND SEMINARS

(a) **Commodity Group Marketing Seminar**

A marketing seminar was planned and coordinated by Karen Neal, Chicken Producers and Laurie Thompson, Pork Producers in cooperation with a market consultant, Bill McArthur from a Halifax firm. With four new promotion assistants coming on stream for the summer, it was felt that a general review of marketing plans and effective promotions was needed as a refresher for commodity promotion representatives and as a general introduction for the new marketing assistants.

This office was invited to attend the day long seminar. The whole exercise was beneficial but several stumbling blocks arose when attempts were made to design a cooperative group promotion which would meet all participants' needs. The seminar did remind promotion representatives to always adhere to a well thought out marketing plan which includes evaluation.

(b) **Canadian Federation of Agriculture**

This office made a presentation to the CFA on plant breeders' rights, patenting of life forms, soil degredation, and land use.

(c) **WINS "Families Feeding Families" program**

The Families Feeding Families' program was designed by WI groups across the province. Resource people were asked to speak on topics related to agricultural technology, innovations, and the industry's role in putting food on the table.

The slide show presentation titled "Meeting the Challenge" was given to Families Feeding Families programs in Bible Hill, Oxford and Hants County.

(d) **Canadian Milk Supply Management Meetings**

This office assisted the local board with meeting planning.

(e) **Marketing Challenges '88**

Confirmed speakers included Bob Church, Charlie Broadwell and Colin Mason. Arrangements with the Sheraton were initiated and the plans were starting to fall into place.

(f) **Other Speaking Engagements**

- Rotary Club in New Glasgow re Ag-Awareness
- AIC annual meeting in Newfoundland - banquet speaker

V MARKET DEVELOPMENT

(a) **Bermuda Hay Shipments**

This office has continued to monitor hay shipments to Bermuda through the Nova Scotia Hay Co-op. A new player wanting to get involved in shipping hay was quoting shipping costs far below that of the Hay Co-op. His figures were obviously unfounded and his efforts to obtain support from local suppliers were not successful.

Arrangements were made with the Hay Co-op to supply a new Bermuda farm operation with a consistent, high quality hay.

(b) **Quaker Oats**

Quaker Oats Co. planned to launch a new blueberry product with frozen dough and frozen berries. This project was launched following the Hostex Show in Toronto.

Their first berries were purchased through Oxford Frozen Foods. However, after experiencing considerable bleeding into the batter by the frozen berries, their research and development team felt their problem rested with the source of blueberries. Our efforts to convince them otherwise came to no avail as the company switched to a berry supplier in Quebec.

However, this office persisted and indicated that research on frozen batter was on-going at the Kentville Research station. The marketing manager was invited to pay a visit to Kentville. Their first order of approximately 120,000 pounds of berries was quite substantial and we will continue to work together to develop a quality product.

(c) **Boland's Broccoli**

Don Rhyno, Producer Manager for Bolands, requested assistance from our branch in developing some new packing and storage technology for broccoli. A new technology currently being developed will extend the shelf life of

broccoli approximately 4 - 5 days. This procedure is currently done by hand but machinery is available.

Their request for funding assistance was referred to the Market Development Section of AFDA. The relevant information for application was passed along to Don Rhyno.

(d) **Bluenose II Promotion**

The Bluenose Boston Promotion to food brokers and buyers was a big success. Our office participated in three cruises on June 19 as well as two provincial cruises on June 20. The Consulate office in Boston and staff were excellent assistance in the pre-organizing and this office, with cooperation from Janis Raymond, coordinated the on-deck catering.

The agricultural products represented at the show included Leonard Sarsfield's fruit pies, Farmers UHT milkshakes and fresh produce. Leonard Sarsfield lined up two interested brokers and before he left Boston, a contract was signed. Transportation of frozen pies through Pole Star Transport was also arranged.

Two brokers showed interest in Farmers UHT milkshakes. This office acted as liason in the negotiations between Farmers and Tully and Son. A positive sale within from four to five months was anticipated as it would take that long for regulations to be set down.

There was good representation from the produce buyers and all were pleased with Nova Scotia product received in the past.

Hall and Cole Produce Co. turned out in full force and one of their principals requested that a blueberry tour be arranged so that he could come up and assess potential for sales in this market season.

Both the major Cobi Foods brokers came to the promotion and brought significant numbers of customers with them. They have been pleased with Cobi in the past and intend to continue to do business with them in the future.

Earle De Merchant from Co-op Atlantic was also on hand representing the Parrsboro Blueberry Co-op. He attempted to organize some fresh strawberry shipments to Boston and four growers were identified. Our office will monitor the developments.

V GENERAL

Trade Development Authority

This office acted as departmental liason with the Trade

Development Authority. Responsibilities included co-ordination of upcoming trade events with other government departments. In the upcoming year, several new projects will be coordinated and completed through this office.

ANNUAL REPORT 1987

Cheryl S. Baird
Graphic Artist

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

ANNUAL REPORT
1987 - Cheryl Baird, Graphic Artist

Attached is a tabulation of the work completed from January 1, 1987 to December 31, 1987. This information was compiled using Weekly reports done throughout the year. Due to the variety of unrelated types of jobs...it was difficult to keep the list to a minimum.

This list BY NO MEANS accounts for actual time spent...it only records completed projects/tasks, etc. For example, one figure might represent several days work, while another might be twenty minutes.
One can only estimate the time spent, according to the nature of the job.

I have categorized the tabulations into the following groups:

A - Marketing & Economics Services
B - Other N.S. Dept. of Agriculture
C - N.S. Agricultural College
D - Outside Organizations related to Agriculture (usually via Department Staff)
E - Other

Other work not tabulated (falls into no category):

- helping the college with Graphic Supply order for Gambia
- taking photograph of MacMillan Show Center from the roof of the raceway.(VERY DANGEROUS WORK!!)
- Computer Seminar (Government Services)
- Staff Conference (helping with Audio Visual co-ordination)
- helping in the co-ordination of booth displays
- majority of my own typing (Computer - Word Processing)
- passing on computer skills attained to others
- presentations
- sewing curtains for demo table/napkins (booth display)
- taste-testing

ANNUAL WORK SUMMARY
1987 - Cheryl Baird, Graphic Artist

	A	B	C	D	E
MEETINGS/CONSULTATIONS: (does not include brief)	26	24	7	14	2
ERRANDS:	13	6	6	-	-
CAMERA-READY ART/MECHANICALS:	27	40	6	17	3
Camera-Ready TYPING/layouts: (handouts,cards,recipe books, newsletters, etc.)	41	7	1	2	1
DRAWINGS: (for slides,overheads, publications, etc.)	23	22	23	6	4
SIGNS(all types):	30	27	8	2	3
DESIGNS & MOCK-UPS:					
Brochures:	4	6	-	1	-
Covers:	2	5	1	6	2
Posters:	-	1	1	4	-
Logos:	5	-	-	9	-
Letterheads:	2	5	8	-	-
Ads:	7	-	16	1	-
Other:	7	6	-	6	-
HAND-LETTERING/SETTING TYPE:	-	28	2	3	-
COMPUTER MAIL:	2	-	-	4	-
PASTE-UPS FOR SLIDES:	12	52	-	2	-
COMPUTER SLIDES:	62	105	32	19	-
PMT's (Photo Mechanical Transfer)	140	72	20	56	-
TRIPS	4	-	1	-	-

ANNUAL REPORT 1987

Sheila J. Ferguson
Audio-Visual Technician

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

INTRODUCTION

Audio Visual has witnessed a steady increase in production and consultation services over the past year.

There has been a strong effort, by the majority of branches, to upgrade and , when possible use, in-house produced visual support to accompany lectures, presentations and workshops etc.

At one time, the flip chart and an overhead projector were considered modern tools for effective presentations- but not today. We are part of a growing society who are very aware of high technology. We are part of the video era. It is no longer acceptable to just give a talk. People want to be entertained.

I believe the department was made very aware of the "necessity" of good visual support material in the presentation given by Mark Waldrin of Guelph University at Staff Conference. We have come a considerable distance over the past three years and the results are beginning to be noticed. In 1988 there really should be no excuse (be it budget or time) for poorly produced visuals.

The primary objective of our program is to meet the audio visual requests which come our way.

1. PHOTOGRAPHY

Over the past year, the area of photography (location and studio) has increased to about 65% of my work load. This, as a result, has increased the demands on what I term as our application of a "slide library".

To date photography services have been provided to all Branches on a first come first served basis. The requests from Agriculture Canada have dropped off substantially. Federation and Commodity group requests must now be approved by the Marketing Specialist (Linda or Laurie) or receive the Director's support. This has corrected the "front door" requests. The following represents larger photography projects assigned this office in 1987:

(a) Poster Production

In 1987 we ventured into a new area - poster production. The results were very pleasing. A poster campaign was produced for the Apple Growers Association followed by the Strawberry Growers' request for a poster and we ended the summer with "Out of The Blue", the poster campaign produced for the Blueberry Growers Association. Cheryl, myself and the commodity specialist involved worked together to develop the theme , layout and design for each poster. The production of these posters has opened a new area of production for audio visual services.

(b) Creation of New Booth

Another rather large project which came my way this past year was the creation of the photo stock for the new departmental booth. The booth was designed by Government Services and was composed of five panels. The booth took on a totally new look. The photos were created as duratrans which are back lit.

There was considerable effort and time put into the creation and shooting of the 6 x 7 transparencies. Twenty-two of the twenty-six shots were new shots taken specifically for the booth project. Unfortunately, there was some disappointment in the printed material. This may have resulted from the lack of proof reading the text as this all happened as Sherry was leaving the department. I understand the errors in print can be corrected. This should be looked into prior to Winter Fair '88.

(c) Horticulture and Biology - "Photo Image"

After much consultation with the Director of Horticulture and Biology, a decision was made to create a"photo image" for the branch. It was decided to create an image that would capture each of the thirteen crops represented in

their natural growing environment i.e. apples-on the tree, grapes - on the vine) To date, seven of the thirteen crops have been photographed. The project is being shot with the professional 6 x 7 camera and shot on transparency film making the work readily accessible for color separation. The transparencies are held as property of Marketing and Economics Branch and have been placed in the slide library.

The Horticulture and Biology Branch have incorporated the new photo image as part of their booth display and have had 16 x 20 copies of the seven photographs made to hang in their office hallway.

(d) Extension Newsletter - Cover Shots

Extension Branch has developed a new format for their newsletters. I was approached to assist in supplying cover shot material. To date, this office has been responsible for three of the five cover shots. We are also providing a good supply of 3½ x 5 and 5 x 7 black & white photos (either from a specific location shot or material taken on the copystand) to accompany articles.

After discussing a potential shot list with the area ag rep., he/she then selects area farms that cover items on the shot list. By travelling with the ag rep I eliminate time consuming leg work and the frustration of a day on the road and no shots. This past year I spent two days collecting 35mm transparencies and black and white shots on soil preparation for spring planting and two days collecting shots on hay making systems used through the province. The 35mm transparencies taken of the European Krone haylage system and the round bale wraps have since been used **extensively** by forage specialists and agriculture representatives as they were asked to speak at various meetings through this province and Newfoundland.

(e) Slide Library

As you can see, the "Extension Newsletter cover shot" project has a more important second function. That of helping to build a slide library. A slide library is a resource this department cannot afford to be without. The requests for loan out material has increased 60 - 75% over the past two years. We are attempting to educate the departmental staff of the **importance** if not the necessity of effective communications. This includes the use of visuals. I am sure you are familiar with the expression "a picture is worth a thousand words".

It is also our mandate to educate the general public of the importance of our natural resource - agriculture. Over the course of the past six months, I have had ten requests for library material demonstrating agriculture as it relates to tourism. The most recent, a request for scenic and high technology slides for a show being put together to entertain the New England Governors. It has been my feeling that we in agriculture do not capitalize on the abundance of beauty this province provides as it relates to agriculture. The view from Cape Blomodin as seen at blossom time will hold it's own against any shot I have seen at Peggy's Cove!!

Another potential source for "stock shots" comes from the possibility of a departmental newsletter. It has been suggested, with the hiring of a departmental public relations officer, that a Departmental Newsletter be published. With a combined effort and budget dollars of the eight branches, a rather informative and impressive Newsletter could be produced thus creating a strong possibility to have at least the cover shot printed in full color. To date this project remains only on paper.

(f) Post Card Project

Early last summer I was approached to investigate and prepare "stock shots" of various campus sights for the printing of a NSAC Post Card. The post card would be on sale at the college bookstore and could also be a potential resource to develop a Departmental Christmas Card.

Dale Ells and I met twice to discuss the possibilities and finances of such a project. To date, four transparencies have been prepared and out of these four, two were selected. Two price quotes for color seperation and printing were obtained by this office.

The project has not gone any further due to lack of support and funds from the college. If I am to resume this venture as a 1988 project, there will have to be firm committment and funding given on behalf of the college.

CONCLUSION:

The following table shows the number of photography assignments covered by this office over the course of 1987. Note the increase in copystand (lith) assignments by Department staff. This is a result of Staff Conference. The assignments are broken down into three categories:

Location - which refers to shots taken on location. Usually 35mm color transparency and black & white re press release material.

Copystand - refers to shots done on the copystand using the nikon F3 high eye point with macro lens. Usually shot in veri color on lith film. The lith is developed and dyed by this office.

Studio - assignments account for the majority of talent. These assignments are all shot with a medium format professional camera (6 x 7) and are usually shot in transparency film(best for color separation). Studio assignments are a real challenge and the results to date have been very positive. All studio work is channeled through the Marketing Specialist. Therefore, the photographer can be "protected" from the commodity groups.

The category "other" refers to Federation of Agriculture, Agriculture Canada and Commodity Boards.

Photography Assignments - 1987

	Department	College	Other
Location	105	10	8
Copystand	65	8	7
Studio	25	3	3
Total	195	21	18

II PRODUCTION

This past year this office was responsible for the production of two slide shows.

The first, a single projector show, was produced for John Higgins in cooperation with the Atlantic Land Improvement Contractors Association - ALICA. The objective of this presentation was to demonstrate to heavy machinery operators and the farm community the long term benefits received when land clearing is carried out according to ALICA standards. These standards were set by the ALICA Association in agreement with the Department's Engineers.

Working on a shoe string budget, I had the sound track and voice recording produced locally, but learned via this experience, cutting costs equals cutting quality. Not to dwell on the negative, I ran into several problems with the audio track. Needless to say, I was less than happy with the overall quality of the ALICA show.

The second production took the form of a multi-image, three projector presentation developed for our branch. Food Marketing Innovations - "A Nova Scotia Perspective" had a rather "slow" beginning but got rolling by the first week in December -- and we met our January 13-14 deadline -NO PROBLEM!!

The show's objective was to demonstrate how Nova Scotia producers have used innovative ways to market their products and meet changing consumer demands. Of the twenty or so market innovations submitted by Marketing Specialists, the following five innovations were covered in the 13 minute 20 second presentation:

1. White Endive- grown and marketed by Jan Punt
2. Kings Produce Limited - a company composed of five shareholder/ farmers who have successfully co-ordinated their produce sales and shipments through a central sales desk.
3. Grand Pré Wines Limited - under the capable hands of Roger Dial, have taken the direct sales and delivery approach
4. Market Innovations at Retail - cover innovations in the dairy industry, cured or ready-cooked meats, changes in the poultry industry - Golden Chicken.
5. Generic Promotion - On site promotions, producer representation at exhibition and trade shows and the foodservice market promtions.

The show has a nice blending of the "tricks of the trade" . Professional narration and broadcast studio quality sound track helped make the production a quality show.

On May 5th the three projector show will be transferred to video thus making it a wee bit easier to "cart" around. To date there have only been three showings prior to staff conference - all with very positive responses.

III VIDEO TAPE PRODUCTION

This office has received a substantial increase in the number of requests to record and produce video tape. I have been approached to produce a total of 10 video presentations. Of these ten requests, extensive proposals and budgets have been submitted for approval. The requests are as follows:

1. Grape Pruning (½" VHS for short course material re B. Murray)
2. Mechanical Strawberry Harvestor Trials (½" VHS footage for training purposes).
3. Straw Spreader Trials (shot in ½" VHS footage for training purposes only)
4. Challenge '87 Project (½" VHS footage showing the benefit of Federal and Provincial funding through make work project)

5. Agriculture - Kings County (½" VHS production)to illustrate the importance and the impact of agriculture and agriculture's spin-off industries on the Valley economy. This project was going to be partly funded by the Kings County Federation of Agriculture and produced as a promotional video.

6. Sheep Handling Systems (3/4" U-matic video production) based on a slide tape set produced four years ago.

7. Wool Marketing in N.S. (3/4" U-matic video production)to educate and promote N.S. wool products.

8. Land Clearing and Soil Erosion (3/4" u-matic video production)based on the N.B. production Soil Degredation.

9. ALFI project - Haying Storage Systems (3/4" u-matic production)based on Federal Provincial Funding .

10. Horse Power (3/4" u-matic production)to be produced for the Farm Safety Committee to demonstrate the necessity of making farm safety a daily function on every N.S. farm.

Of these ten projects, only six got beyond the proposal and budget stage. The proposal and budget stage of any project will seperate the serious from the non-serious - those who just want to shoot a video.

Of the six proposals, only five actually have been approved and had footage or in the case of "Horse Power" will have footage shot.

Last August considerable footage was shot on the ½"VHS recorder for Vernon Murray. Unfortunately Mr. Murray was unable to find budget money to have the presentation completed. Note: Sometime when this office is not**"completely booked"**, I will investigate the editing facilities at Teachers College and the studio Art Lightfoot runs in Kentville.

In 1988 we are scheduled to produce one 3/4" u-matic tape titled "Horse Power". This production is funded by the Farm Safety Committee and Agriculture Canada. This is a major project and will consume a great portion of my time.

The area of Departmental video tape productions must be seriously and cautiously looked at by the Directors of this Department. The question of "in-house" productions vs Governmeny Service produced projects should be addressed at the Directors' level and perhaps a policy statement could be issued stating the wishes of the Department as related to media produced packages.

In order to keep abreast of the new technology in the agricultural industry, it is my belief that we, as a Department, must find budget to support the purchase of video tape equipment.

Last February we purchased a new camera/recorder-AG 160 which will help meet the demand for ½" VHS recordings. These recordings are non-broadcast quality and are valuable teaching aids for short courses, in-house technology demonstrations (e.g. mechanical strawberry harvestor trials.)

Brian, I realize an "Annual Report" is not the place to nag one about my concerns re video tape production. Unfortunately, this is the one area that causes great frustration. Three years ago I was satisfied and content with the message that came back from the Directors to be "patient". I'm still patient but my concerns are raised every time an outside project comes bursting through my door only to realize the project is impossible due to the budget necessary to cover camera and recorder rental costs. Brian, I guess I'm just tired of drafting budgets and writing proposals only to learn we are coming no closer to purchasing a broadcast quality equipment.

There are several other branches now seriously looking at the application of video tape presentations. Horticulture & Biology, Ag. Engineering and Livestock have all made inquiries into the capital cost involved in purchasing video equipment.

IV STAGING AND EQUIPMENT PURCHASE CONSULTATION

This office was responsible to coordinate and stage all audio-visual equipment for the Farm Management Challenges held in February at the Hotel Nova Scotia. Due to the extensive amount of time and planning that went into the organization of this conference, there were only a few last minute equipment changes. I might also note the audience was well entertained with a good mix of computer graphic and live graphic slide material in the key note address by the vice president of Ralston Purina Company. It was very obvious Ralston Purina have put lots of money into effective presentation material.

This office also coordinated and staged the equipment requests for the 1988 Staff Conference. Staff Conference is held every second year and runs for two days.

The theme this year was "The Challenge Ahead". This theme certainly applies to our mandate in audio visual production! The conference took on a new look this year. There were four concurrent sessions, each scheduled to run twice. The four topics covered were: 1. Young and Part-Time Farmers; 2. Technology in Farm Production; 3. Innovations in Food Marketing; 4. Innovations in Food Development.

There was much time and effort put into the four sessions and I believe the choice of the concurrent sessions met with positive support.

This office also was responsible to coordinate and stage the equipment requests for Agri-Food Development Agreement Conference held last January 1987 at Keddy's Motor Inn.

This office was responsible to stage the multi-image slide presentation "Meeting The Challenge" on several occassions. The show toured the province as part of the program "A Taste of Nova Scotia" and "Families Feeding Families". These two programs were run in conjunction with the Home Economics Department. There were a total of six road trips.

EQUIPMENT PURCHASE CONSULTATION AND RESEARCH

Upon request, this office has researched various pieces of audio visual equipment. Until this past winter it was necessary for college faculty to obtain our permission on the purchase of new audio visual equipment. This function was more or less a rubber stamp procedure as college has funding from research grants to purchase much of their specialized equipment needs.

The last request for a rubber stamp approval took the form of a slide duplicator, requested by the Biology Department. This request was forwarded to our Director to be put on the agenda of the up-coming Director's meeting. As a result of the meeting, a committee was formed to monitor requisitioned audio visual equipment. The Directors also agreed that audio visual services should attempt to meet the demands for specialized equipment and that we need to work together to have specialized equipment under the control of audio visual services.

V CONCLUSION

This past year has been a full year - one that saw the launch of many new photography projects. Many of the photography projects posed a real challenge and for the most part, the end results were seen as positive.

Our branch came under new leadership with the installation of the Director in March 1987. This office is delighted with the support (when needed) and the freedom to "run my own program". For the first time the technical component (Cheryl and myself) have been included at Branch Meetings- nice to be included.

We in agriculture have come a long way from the days of the overhead and chalk board but our work is cut out for us. We all must continue to improve our presentation skills and include the quality of visuals that are readily available.

In closing, I would like to share this little true story to

help illustrate my philosophy.

In January 1987 I was approached by Anne Forbes to stage the visual presentation for the new Agri-Food Development Agreement . All Federal and Provincial sectors were involved. Did you know that over 2,000 man hours were spent in preparing the text that was to be presented? Now that 2,000 man hours equals a lot of salaries all the way from our Deputy Minister Ralph Morehouse to Dr. Doug Byers on the Federal side, and out of the five groups making presentations, only **one** person thought far enough ahead to have the material converted from overheads to slides so the entire audience would be able to read the information on the screen. Now, as luck would have it, the first meeting date had to be cancelled because of a snow storm and I was able to transfer all the information to slides so the story does have a happy ending.

The point I would like to make is, why tie up so much time and money if your audience can't even read the screen. Always think of your audience. A little planning goes a long way.

ANNUAL REPORT 1987

Micheline Gibson
Audio-Visual Clerk

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

Nova Scotia

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JANUARY 22, 1988

Yearly report January 1st to December 31, 1987

VIDEO DUBS PRODUCED BY AUDIO VISUAL = 323 copies

AUDIO DUBS PRODUCED BY AUDIO VISUAL = 90 copies

Micheline Gibson

Audio Visual Services

Audio Visual Equipment Loans

FOR THE YEAR OF 1987

ITEM	COLLEGE term		DEPARTMENT term		OUTSIDE	TOTAL
CAMERAS flash, lenses ~~tripods~~		8		58	4	70
16 mm MOVIE PROJECTORS	13	25		18	19	75
OVERHEAD PROJECTORS	10	30		79	19	138
PROJECTION SCREENS & MISC.	6	54		148	33	241
CAROUSEL PROJECTORS	6	44		101	45	196
RINGMASTERS	1	27		25	2	55
SOUND SYSTEMS	2	16		49	15	83
SUPER 8 EQUIPMENT	---	---	---	---	----	----
TAPE RECORDERS	5	22		36	3	66
VIDEO TAPE EQUIPMENT ~~& MICROWAVE~~		10		14	5	29
SLIDE SHOWS/ FILMS/ VTR TAPES		5		48	15	68

Recordings

FOR THE YEAR OF 1987

Garden Guide Series 5 Cuts per tape 13 Radio Stations X 26 WEEKS = 338 TAPES

Radio Tapes 2 to 4 Cuts per tape 8 Radio Stations X 50 WEEKS = 400 TAPES

Extension Ag. Reps. 1 cut per tape X 52 weeks = 52 TAPES

RADIO TAPES PRODUCED FOR THE YEAR OF 1987 790 TAPES

ANNUAL REPORT 1987

Stuart F. Allaby, Chairman
Natural Products Marketing Council

Marketing & Economics Services
Nova Scotia Department of Agriculture & Marketing
Truro, Nova Scotia

Natural Products Marketing Council

The legislative authority to create a Nova Scotia Marketing Board, commodity market plans and Boards is found in the Natural Products Act. This Act was amended in 1982 and authority was provided for Boards to control production, as well as the marketing of natural products.

The Legislature named the Governor-in-Council as the supreme authority over this specific Act, reports being presented by the Minister of Agriculture and Marketing.

The Governor-in-Council has appointed a five-person Council to act: Chairman Stuart Allaby; members - Donald Gunn, Alfred Scothorn, Harold Lusby and Laurie Hennigar.

The Secretary, the Director of Marketing and Economics - Brian Smith -, is a permanent employee with the Nova Scotia Department of Agriculture and Marketing.

The legal advisor is Jonathan Davies from the Department of Attorney General.

Under the Act ten marketing boards have been formed and use the authority granted under the 1982 amendment.

Council met eight times during the 1987 fiscal year. Turkey processors appealed the Turkey Board price four times. The Council heard three appeals by producers not satisfied by Turkey and Chicken Board regulations as it affected their quota.

As Chairman, two meetings with the Chicken Price Committee and Processors re price negotiations were held.

The Council met with Egg, Chicken and Turkey Boards regarding the Price Waterhouse report on supply management operations in chicken, egg and turkey to consolidate the Nova Scotia industry and government stand.

Council met with the Greenhouse Vegetable Marketing Board and reviewed their plan. Those producers affected will vote on plan,with Council providing all necessary advertising and scrutineer services.

Some Council members met with Fruit Growers Association. They, too, are preparing a plan to be put before the producers in the next few months.